



## 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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## Table of Contents

OASBO Professional Development Overview .....	4
Conferences.....	5
Business Operations.....	6
Essentials Courses.....	7
Food & Nutrition.....	9
Leadership.....	10
New Treasurers.....	11
Finance.....	12
Finance Office Support Staff.....	14
Online Courses.....	15
Standards for School Treasurers.....	16
Standards for School Business Managers.....	18

## *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 Pandemic Status**

Due to the COVID-19 Pandemic, all of OASBO's courses for 2020-2021 will be offered with limited in-person seats (26 seats) and livestreaming options, until further notice. We will reassess as state guidelines and restrictions change and adjust to the status of the pandemic. Due to the cost of the technology needed to livestream seminars, the cost for in-person and livestreaming registration will be the same.

### **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. A statement will be posted on the website event detail page of those courses offering Ashland credit. Registration forms will be available at the event.

### **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 the [upcoming events](#) or [online learning sections](#) in the 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-conference](https://oasbo-ohio.org/annual-conference)*

*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 trade show to connect school business officials with school district product and service providers. Visit [oasbo-ohio.org/annual-facilities-conference](https://oasbo-ohio.org/annual-facilities-conference) to learn more.

*Contact Hours: Up to 12*

*Cost: Early Bird - Member \$325 / Non-Member \$650; Full Price - Member \$350 / Non-Member \$700*

*Offered: December*

#### **BASA/OASBO Team Collaboration Conference: Facilities, Finance, & Safety Planning**

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 trade show to connect school business officials with school district product and service providers.

*Contact Hours: Up to 12*

*Cost: Early Bird - Member \$325/Non-Member \$650; Full Price - Member \$350/Non-Member \$700*

*Offered: December*

#### **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: Member \$240 / Non-Member \$480*

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

#### **OASBO/BASA Finance, Facility and Safety Conference**

Designed for business managers, treasurers and superintendents, this one-and-a-half-day conference includes several learning tracks and sessions aimed at school district issues involving each role. 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*

## ***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 and finance. 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: 11*

*Cost: Member \$240 / Non-Member \$480*

*Offered: October*

### **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 / Non-Member \$480*

*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: Member \$240 / Non-Member \$480*

*Offered: December*

### **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: Member \$240 / Non-Member \$480*

*Offered: January*

*Continued on next page*

### **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: Member \$240 / Non-Member \$480*

*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: Member \$120 / Non-Member \$240*

*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: Member \$240 / Non-Member \$480*

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



### *Leadership*

#### **Leadership Conference**

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

*Location: Varies*

*Contact Hours: 9*

*Cost: \$200*

*Offered: October*

#### **OASBO Leadership Institute**

The OASBO Leadership Institute is a year-long program that is rigorous and challenging. 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.*

#### **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 webinar and course are available by going to [OASBO's eLearning site](#).

### ***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: Member \$120 / Non-Member \$240*

*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: Member \$120 / Non-Member \$240*

*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: Member \$120 / Non-Member \$240*

*Offered: December*

#### **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: Member \$120 / Non-Member \$240*

*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: Member \$240 / Non-Member \$480*

*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: Member \$240/Non-Member \$480*

*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: Member \$240/Non-Member \$480*

*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: Member \$120 / Non-Member \$240*

*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*

*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*

### **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: Member \$120 / Non-Member \$240*

*Offered: September*

*\*This seminar was previously offered in five regions. This year, due to the COVID-19 Pandemic, it will be offered once in person with limited seating at the OASBO Conference Center, and a livestream will be available for everyone across the state.*

### **Treasurers Hot Topics**

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

*Contact Hours: 7*

*Cost: Member \$120 / Non-Member \$240*

*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**

Addressing AP hot topics, you will 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: Member \$120 / Non-Member \$240*

*Offered: September/October*

*\*This seminar was previously offered in five regions. This year, due to the COVID-19 Pandemic, it will be offered once in person with limited seating at the OASBO Conference Center, and a livestream will be available for everyone across the state.*

#### **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 / Non-Member \$240*

*Offered: September/October*

*\*This seminar was previously offered in five regions. This year, due to the COVID-19 Pandemic, it will be offered once in person with limited seating at the OASBO Conference Center, and a livestream will be available for everyone across the state.*

#### **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*

## ***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
- Don't Click on That! Cybersecurity Awareness Training (FREE)
- 2020 Annual Conference Recorded Virtual Track sessions (FREE for a limited time)

## **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 webinar and course are available by going to OASBO's eLearning site.

## **Food Service & Transportation Online Offerings**

Coming soon

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

## Ohio Standards for School Treasurers

<b>1</b>	<b>Leadership: School treasurers participate in a leadership role within the district.</b>
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.
<b>2</b>	<b>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.</b>
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.

<b>3</b>	<b>Facilities, Property and Capital Asset Management: School treasurers provide fiscal leadership in the management of capital assets and support services.</b>
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.
<b>4</b>	<b>Communication and Collaboration: School treasurers communicate and collaborate effectively with the board of education, district leadership and stakeholders.</b>
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.
<b>5</b>	<b>Professionalism: School treasurers are committed to a high level of professionalism in their conduct and adhere to established ethical standards.</b>
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

<b>1</b>	<b>Leadership</b>
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.
<b>2</b>	<b>Facilities Management</b>
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.
<b>3</b>	<b>Business Operations</b>
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.

<b>4</b>	<b>Risk Management and Safety/Security</b>
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
<b>5</b>	<b>Communication and Collaboration</b>
5.1	Demonstrate competence in the communication of operational issues to all stakeholders.
5.2	Communicate and collaborate with internal and external stakeholders.