

**INDIANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
CERTIFICATION PROGRAM
COURSE DESCRIPTION**

Acronyms: **CBO – Chief Business Officer** **FD – Facilities Director**
 ACBO – Assistant Chief Business Officer **HR – Human Resources Specialist**
 BOS – Business Office Specialist

FOUNDATIONS

Principals of Education (3 hours, Required – FD, HR / Elective - CBO, ACBO, BOS): The course will start with a brief history of education in the United States including a look at the laws that established the role of federal vs. state government and local school board powers. The culture of schools, teaching and learning theories, and theories of school finance will be explored. **Course Number: F110**

Public Relations and Internal Communications (3 hours, Required – FD, HR / Elective - CBO, ACBO, BOS): The ability to enhance and maintain a positive public image of public education and local schools is a valuable as well as vital skill. The course will explore techniques to master effective communications within the school community, with school board members and in a public forum. Learn how to develop a public relations plan, use internal and external committees, solicit and manage public input, and proactively deal with rumor control, and work with the media. **Course Number: F120**

Governance and Operational Relationships (3 hours, Required – FD, HR / Elective - CBO, ACBO, BOS): An in-depth look at school governance and the interactions between various school corporation departments will be the focus of the course. Governance topics will include: the legal powers of the state vs. the local school board; board policy vs. administrative procedures; and legal and interpersonal relationships between school board members, the superintendent, the staff, and the public. The course will also explore the formal and informal interactions that exist between the administrative and operational offices with-in a school corporation (school principal, business office, personnel office, transportation, school food and nutrition program, buildings and grounds, and the technology department). **Course Number: F130**

HUMAN RESOURCES

Managing People (3 hours, Required – FD, HR / Elective - CBO, ACBO, BOS): Gain the fundamental techniques needed to effectively manage and motivate employees. Learn how to structure productive staff training, keep staff informed and control rumors, effectively evaluate employees, encourage teamwork, and promote personal improvement. Study methods to successfully manage difficult people. **Course Number: HR115**

Performance Evaluation (3 hours, Required – HR / Elective - CBO, ACBO, BOS, FD): Learn the difference between observation and formal evaluation, how and when to evaluate employees, what documentation should be placed in the employee's personnel file and what type of follow-up should be administered. Employer intervention programs, employee disciplinary action, probation and discharge will be discussed. **Course Number: HR120**

Introduction to Human Resources Administration (3 hours, Required – CBO, HR / Elective – ACBO, BOS, FD): The course will focus on the overall aspects of human resources in public schools and will include staffing practices for both certified and classified positions, tenure, at-will employees, benefits administration, labor relations, employee retirement plans, contract administration and payroll administration. **Course Number: HR 110**

Human Resources Administration (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD): Designed for the career professional in school Human Resources, the course will provide an in-depth look at legal as well as practical approaches to hiring practices from recruiting, interviewing, reference checks, staff orientation, and record keeping. Learn how to properly establish, maintain and manage personnel records, and handle requests for employee records. The course will explore federal and state laws and mandates relative to the personnel office. The relationships between school board personnel policies, administrative personnel procedures, and personnel handbooks will be explored. **Course Number: HR 210**

Benefits Administration (3 hours, Required – ACBO, HR / Elective – CBO, BOS, FD): The course will emphasize the laws, regulations, and practical aspects of providing employees with medical, dental, vision, long-term disability, life, and long-term care benefits. Also included will be issues related to HIPPA, COBRA, 403 (b), 401 (a), VEBA and Section 125 plans. **Course Number: HR 111**

Labor Relations/Contract Administration (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD): The session will detail administration of the collective bargaining contract in regards to discussion, grievances, complaints, salaries and wages, and benefits. The course will also examine the legal differences between an employee and an independent contractor; and issues related to at-will employees, workers compensation, job site discrimination, sexual harassment and various types of employee leave. **Course Number: HR 112**

Payroll Administration (3 hours, Required – ACBO, HR / Elective – CBO, BOS, FD): The course will emphasize the laws and regulations related to the payroll function, including state and federal payroll laws and regulations (FMLA & FLSA-overtime, wage and hour issues), pertinent tax regulations, employee retirement plans and reports, practical aspects of completing a payroll, electronic deposits, union dues and other employee generated deductions. **Course Number: HR 113**

Collective Bargaining Strategy & Law (3 hours, Required – CBO, HR / Elective – ACBO, BOS, FD): The class will review Indiana law associated with collective bargaining, the role of IEERB and its rules and procedures, power bargaining, collaborative bargaining, mediation, fact-finding, strike plans, bargaining strategy, grievance procedures and current issues. In addition, the goal of the course will be to review Indiana law and court cases regarding bargaining and/or meeting-and-confer agreements related to classified staff. Participants will learn which employees are covered by rights under the law and the appropriate employment and dismissal procedures. The course will demonstrate how to appropriately structure employee handbooks, job descriptions and letters of employment. Fair Labor Standards and unemployment rules and regulations will be studied. **Course Number: HR 114**

Group Health/Medical Insurance (3 hours, Required – CBO, ACBO, HR / Elective - BOS, FD): The session focuses on the basics of group insurance especially medical benefits, premium contributions, fully insured programs, minimum premium, self-funded, networks, trusts (MEWA), PL 232, reserves, open enrollments, HIPPA, COBRA, dental, vision, life, LTD, and long term care. **Course Number: HR 116**

Group Unemployment Insurance (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD): Elective - BOS): Group unemployment insurance, group and personal disability insurance, and state unemployment insurance will be covered in detail. Find out how to process worker's compensation and disability claims; as well as keep the payroll office appropriately notified. Learn how to structure programs and monitor claims to both protect employees and the financial resources of the school corporation. Learn how to detect and deal with employee abuse or fraud related to unemployment and disability claims. Discover effective occupational therapy programs and techniques to get employees back to work. **Course Number: HR216**

FACILITIES and GROUNDS

Introduction to Facilities & Grounds Administration (3 hours, Required – FD / Elective – CBO, ACBO, BOS, HR): The goal of the course is to introduce new administrators to basics of facility and grounds administration. The role of the Facilities Manager in the educational community and the impact of facilities on the learning and work environment will be the major focus of the class. Legal and regulatory responsibilities will be discussed. Specific topics will include staffing and staff training, roofs, parking lot maintenance, lighting, day to day cleaning and maintenance, long term maintenance programs, pest control, mold, indoor air quality, utility management, landscape and grounds care. The course will also touch on long term planning for facility renovation. **Course Number: BG116**

Emergency Preparedness Management (3 hours, Required – FD / Elective – CBO, ACBO, BOS, HR): Identify, develop, and learn how to execute a plan to manage a variety of emergencies including: site and building access control, video surveillance, hazardous material spills, natural disasters, security breaches, and various other issues. **Course Number: BG110**

Custodial Operations (3 hours, Required – FD / Elective - CBO, ACBO, BOS, HR): The course offers an overview of custodial operations with an emphasis on procedure manuals, scheduling and staffing, training, proper use of equipment and supplies, and the advantages/disadvantages of service contracts. Safety training will be emphasized; the safe use of cleaning chemicals and equipment, and on-the-job injury prevention will be stressed. **Course Number: BG115**

Maintenance Operations (3 hours, Required – FD / Elective - CBO, ACBO, BOS, HR): The course will provide an overview of maintenance operations including: an emphasis on preventative maintenance, scheduling and staffing, work order tracking systems, and service contracts. Safety practices and procedures for maintenance personnel will be emphasized. **Course Number: BG120**

Systems – HVAC, Electric, Plumbing and Technology (3 hours, Required – FD / Elective - CBO, ACBO, BOS, HR): School facilities are replete with a variety of complex, interrelated mechanical systems. The course will explore the major design features and advantages of each system. **Course Number: BG125**

Utility and Energy Conservation (3 hours, Required – FD / Elective - CBO, ACBO, BOS, HR): Gain an understanding of the gas and electric utilities industry, including: services provide, deregulation, pricing, energy conservation and a look at future energy sources. **Course Number: BG130**

Landscape and Grounds Maintenance (3 hours, Required – FD / Elective - CBO, ACBO, BOS, HR): Discover the advantages of using plants that are native to local Indiana climates. Learn how to select plants and landscaping materials that are both friendly to the local environment and require little cares. The course will explore daily care and long term maintenance practices for school grounds as well as athletic fields. Selection criteria, maintenance and safe use of grounds equipment will be discussed. Legal requirements and safe practices for the application and storage of fertilizers and pesticides will be discussed. **Course Number: BG140**

ACCOUNTING

Fund Accounting/Budget Cycle /Audits (3 hours, Required – CBO, ACBO, BOS / Elective – FD, HR): The concept of fund accounting is basic to the day to day operation of schools and the accounting for revenue and expenditures. The class will introduce the basic concepts, rules and regulations associated with fund accounting. The course will cover the chart of accounts that controls the recording of receipts and expenditures by fund. The class will include a study of the 18 month budgeting cycle used to prepare a budget and audit requirements specific to Indiana. The course will also focus on the administration of grants and funds not developed in the annual budget cycle. Included are the basics of establishing a budget, timely reporting, carry-over funds, close-out of funds and grants, and coordination with payroll. Students will study audit results and comments issues by the Indiana State Board of Accounts, learn how to prepare for an audit, find out what to expect during and discover the appropriate follow-up to an audit. **Course Number: A110**

Information Technology (3 hours, Required – CBO, ACBO, Elective – BOS, FD, HR): A thorough understanding of the reports, data and retrieval methods available to school officials will enhance the ability to manage both time and resources. The session will demonstrate the use of a variety of reports available in standard database systems to help maintain and review information, prepare reports for school board members, build and manage the budget, and help compile data for state budget forms. The course will also explore ways to sort and extract data to better analyze and report information on a regular basis. Current trends in software and hardware will be introduced. **Course Number: A111**

Accrual Accounting (3 hours, Required – CBO, ACBO, Elective – BOS, FD, HR): The course will compare and contrast cash and accrual accounting. Students will learn to read, understand and explain the difference between Income Statements and Balance Statements prepared under the accrual-basis vs. the same types of reports prepared under the cash-basis accounting. Students will learn why the terms Owner's Equity, Retained Earnings, Profit, Prepaid Expenses, Accounts Receivable, Accounts Payable, Capital, Net Fixed Assets and the relationship between Assets, Liabilities and Owner's Equity are so important to the businesses who use accrual accounting. Students will learn how revenue and expenditures are recorded in accrual-based accounting vs. cash-basis accounting and the importance of recognizing the value of fixed assets and real property. In the course students will explore the strengths and weaknesses in each accounting method. **Course Number: A114**

BUSINESS

Budgeting Fundamentals for School Business Officials (6 hours, Required –CBO, ACBO, BOS / Elective – FD, HR): The material for the class will focus on basic budget principles,

terminology and practices needed to by the career school business official. The class will focus primarily on the tax supported funds. A review of prescribed forms used in the budget adoption process with an emphasis on the “16 line statement”, timelines, and adoption procedures will be introduced. Sources of state, local and miscellaneous revenue will be discussed. The course will cover levy and rate controls imposed on each fund as well as review methods used to calculation tax rates and/or levies based upon local assessed values. **Course Number: B 110**

Budgeting for School Operations (6 hours, Required – FD, HR / Elective – CBO, ACBO, BOS): Designed for all school departmental supervisors and directors, the class will focus on essential budget terminology, sources of revenue, fund accounting and fundamental budgeting practices. With a major emphasis on tax supported funds, the course will cover property tax levy and rate controls imposed on each fund, and a review of budget adoption timelines and procedures. The class will explore the role school boards, county, and state agencies play in determining local rates and levies. The basics practices of budget oversight and management will be introduced. **Course Number: B 150**

Budget Oversight and Financial Reporting (6 hours, Required – CBO, ACBO, Elective – BOS, FD, HR): The goal of the class is to help participants monitor budgets on a regular basis, make the appropriate adjustments throughout the year and report the financial status of the school corporation to local governing bodies, state and federal authorities. The class will review cash flow projections, analyze monthly internal transfers and loans, interpret financial statements and recommend appropriate adjustments in spending and investing. Participants will review specifications for banking and other financial services and learn how to make the best investment decisions to maximize interest earned. The class will study compensating balances and other bank charges and the legal aspects of investments including arbitrage. The practice of monthly reconciliation of bank statements will be reviewed and stressed. The importance of annual financial reports will be discussed and model reports will be studied. **Course Number: B111**

IASBO Budget Seminar (20 hours, Required –CBO): The seminar will be an in-depth analysis of the budget process. The goal of the seminar is to provide the tools and sources for successful completion of the annual budget and a review of the final budget order (1782 Statement). Included in the seminar are the steps necessary for the local board of education to advertise, publicly review and adopt the budget. Participants will review all prescribed budget forms, develop revenue and expenditure projections for the ensuing budgets, and follow the steps necessary to complete a CPF Plan and a Bus Replacement Plan. The course focuses on the 16 line statement in terms of how to develop the appropriate dollar amounts to be placed on each line and the relationships between the lines. The differences among the property tax supported funds in terms of levy limits and rate caps are presented. Representatives from the Indiana Department of Education will present an in-depth analysis of the school formula. Rules and regulations that govern school business office practices will be presented by representatives from the Department of Local Government Finance and Indiana State Board of Accounts. **Course Number: B112**

IASBO Treasurer’s Seminar (20 hours, Required – ACBO, Elective – BOS): The class is a complete study of the roles and responsibilities of the School Corporation Treasurer. The class will include accounting practices (funds, revenues, and expenditures), purchasing (purchase orders and procurement), accounts payable (claim cycle, W-9, 1099, record retention), payroll practices (pay cycles, internal records, 941 reports, W-2’s, PERF and TRF reports), grant management, cash management, financial monitoring, fixed assets, budget development, and audit preparation. **The ACBO may substitute the IASBO Budget Seminar for the IASBO Treasurer’s Seminar. Course Number: B113**

ADMINISTRATION

Business Ethics and Fraud Prevention (3 hours, Required – CBO, ACBO, FD, HR / Elective - BOS): The class covers the legal, moral and philosophical issues associated with proper business ethics. Study policies and codes of conduct that can serve as guidelines for employees to follow when if confronted with tough or difficult decisions. Class material will also cover topics such as conflicts of interest, accountability and public trust. The second part of the class deals with fraud detection and prevention. Students will learn to spot behavior or practices that may indicate fraudulent behavior such as ghost employment, bid collusion, bogus billings, falsification of public records, fraudulent work related or personal injury claims and theft. Learn the appropriate actions to take to investigate suspected fraud. Students will explore the legal duty and appropriate steps to pursue individuals suspected of fraudulent activities and learn to develop policies, practices and procedures to reduce or eliminate fraud. **Course Number: ADM 210**

Leadership Development (3 hours, Required – CBO, ACBO, BOS, FD, HR): The course will include segments on ethics, school organizations, inter-personal relationships, culture, leadership styles, and communication skills. **Course Number: ADM 110**

School Law & Administrative Rules Basic (3 hours, Required – CBO, ACBO, BOS, FD, HR): The class will be an overview of the legal foundation of public education including the constitutional and statutory authority, and applicable case law. Topics will include: General School Powers Act, Home Rule, Open Door, Public Purchasing, Public Works and Public Records}. **Course Number: ADM 111**

School Law & Administrative Rules Advanced (3 hours, Required – CBO, HR / Elective – ACBO, BOS, FD): The class is designed to provide an in-depth look at tort liability, students with disabilities, and employment issues including terms and conditions of employment, benefits, discrimination, hiring procedures, termination, employee rights, special education, and interlocal agreements. **Course Number: ADM112**

Public Works Law & Administration (3 hours, Required – CBO, FD / Elective – ACBO, BOS, HR): The program will emphasize the basics starting with the public works laws that apply to schools and includes principles in the planning and design of facilities from conception to bonding, options in methods of construction management, selection of design and construction professionals. **Course Number: ADM 113**

Construction Finance (3 hours, Required – CBO, FD / Elective – ACBO, BOS, HR): The course will start with the legal issues and planning activities to be performed prior to beginning a construction project. The course will cover in detail: funding sources available to a school corporation, 1028 hearing, and preliminary determination process, and bidding requirements. Other topics will include Trustee/Paying Agent, record keeping, continuing disclosure and arbitrage, investment of bond proceeds, capitalized interest, energy savings contracts, and refunding concepts. **Course Number: ADM 114**

Risk Management/Environmental Health and Safety (3 hours, Required – CBO, BOS, FD / Elective - ACBO, HR): The class will present the basics of risk management and a review of the types of insurances needed by school operations. The primary focus will be on worker's compensation, property/casualty, liability, errors and omissions, valuable papers, rental value, and other school specialty risks. A portion of the program would be devoted to understanding options for purchasing insurance, pools, cooperatives, safety committees, and self-funded

programs. The course will provide an overview of environmental health and safety relative to the school environment. **Course Number: ADM 115**

Transportation Administration (3 hours, Elective – CBO, ACBO, BOS, FD, HR): Issues such as driver contracts, CDL requirements, staff development, drug testing, bus types/sizes, purchasing laws, safety programs, single vs. double routing, shuttling, routing and routing software, fuel storage and inventory control, magnet schools and bus maintenance will be covered in the class. **Course Number: ADM 117**

Food Nutrition Administration (3 hours, Elective – CBO, ACBO, BOS, FD, HR): The course provides an overview of record keeping, basic laws governing food service sales and purchasing, government commodity program, staffing, free/reduced lunch programs, labor relations and safety practices. The course will also discuss menu planning, nutrition standards and marketing. **Course Number: ADM 118**

OTHER

IASBO Seminars (CBO -12 hours; ACBO – 7 hours; BOS – 10 hours; FD – 5 hours; HR – 5 hours): Most IASBO seminars are full day seminars and will count as 5 seat hours for each full day seminar.

Elective (CBO - 9 hours; ACBO – 12 hours; BOS – 30 hours; FD – 12 hours; HR – 9 hours): Any certification class taken outside the required certification track. There are several elective classes recommended for each certification track.