



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

Principles of Education (3 hours, Required – CBO, ACBO, BOS, FD, HR)

The course begins 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 – CBO, ACBO, BOS, FD, HR) 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, proactively deal with rumor control, and work with the media. **Course Number: F120**

Governance and Operational Relationships (3 hours, Required – CBO, ACBO, BOS, FD, HR) 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 within a school corporation (school principal, business office, personnel office, transportation, school nutrition program, buildings and grounds, and the technology department). **Course Number: F130**

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 course 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 course will include a study of the 18-month budget 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 an audit, and discover the appropriate follow-up to an audit. **Course Number: A110**

Information Reporting and Data Analytics (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 course 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 and explore strengths and weaknesses in each method. 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 discover 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 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. This course will help participants to be able to communicate with various organizations such as the community, the school board, and Chamber of Commerce. **Course Number: A114**

ADMINISTRATION

Leadership (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: ADM110**

School Law & Administrative Rules-Basic (3 hours, Required – CBO, ACBO, BOS, FD, HR) The course 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: ADM111**

School Law & Administrative Rules-Advanced (3 hours, Required – CBO, HR / Elective – ACBO, BOS, FD) The course 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: ADM113**

Construction Finance (3 hours, Required – CBO, FD / Elective – ACBO, BOS, HR) The course will begin with the legal issues and planning activities to be performed prior to beginning a construction project. It will cover in detail: funding sources available to a school corporation, 1028 hearing, preliminary determination process, referendums, 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 course 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 will 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: ADM115**

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, and bus maintenance will be covered in the course. **Course Number: ADM117**

Food Nutrition Administration (3 hours, Elective – CBO, ACBO, BOS, FD, HR) The course provides an overview of record keeping, basic laws governing food nutrition 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: ADM118**

Business Ethics and Fraud Prevention (3 hours, Required – CBO, ACBO, FD, HR / Elective - BOS) The course covers the legal, moral, and philosophical issues associated with proper business ethics. The course will review policies and codes of conduct that can serve as guidelines for employees to follow when and/or if confronted with tough or difficult decisions. Course material will also cover topics such as conflicts of interest, accountability, and public trust. The second part of the course 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, and 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: ADM210**

BUSINESS

Budgeting Fundamentals for School Business Officials (6 hours, Required –CBO, ACBO, BOS / Elective – FD, HR) This course will focus on basic budget principles, terminology, and practices needed by a school business official to create and manage a budget. Participants will learn about funds, sources of revenue and expenditures for each fund, the difference between cash and operating balances, how to develop and implement a budget, the difference between abstract and certified assessed valuation, and how to manage a monthly cash flow by fund. A brief introduction to GATEWAY will also be provided. **Course Number: B110**

Budgeting for School Operations (6 hours, Required – FD, HR / Elective – CBO, ACBO, BOS) Designed for all school departmental supervisors and directors, the course 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 course will explore the role school boards, county, and state agencies play in determining local rates and levies. The basic practices of budget oversight and management will be introduced. **Course Number: B150**

Cash Management and Financial Oversight (6 hours, Required – CBO, ACBO / Elective – BOS, FD, HR) The goal of the course is to help participants monitor cash flow 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 course 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 course 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 Workshop (20 hours, Required –CBO / Elective – ACBO, BOS, FD, HR) The workshop will be an in-depth analysis of the budget process. The goal of the workshop is to provide the tools and resources for successful completion of the annual budget and a review of the final budget order (1782 Statement). Included in the workshop are the steps necessary for the local board of education to advertise, publicly review, and adopt the budget. Participants will gain understanding to develop expenditure plans in the Gateway System, prepare the ensuing budget, and follow the steps necessary to complete a CPF Plan and a Bus Replacement Plan. 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. **Course Number: B112**

IASBO Treasurer's Workshop (20 hours, Required – ACBO, BOS / Elective – CBO, FD, HR) The workshop is a complete study of the roles and responsibilities of the School Corporation Treasurer. The workshop 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, INPRS reporting), grant management, cash management, financial monitoring, fixed assets, budget development, and audit preparation. **Course Number: B113**

FACILITIES and GROUNDS

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 issues regarding indoor air quality. **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 contacts. 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**

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 the 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 course. 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**

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 provided, 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 care. 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. **Course Number: BG140**

HUMAN RESOURCES

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. Topics will include staffing practices for both certified and classified positions, at-will employees, benefits administration, labor relations, employee retirement plans, contract administration, and payroll administration. **Course Number: HR110**

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 Affordable Care Act, HIPPA, COBRA, 403 (b), 401 (a), VEBA and Section 125 plans. **Course Number: HR111**

Labor Relations/Contract Administration (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD) The course 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: HR112**

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: HR113**

Collective Bargaining Strategy & Law (3 hours, Required – CBO, HR / Elective – ACBO, BOS, FD) The course will review Indiana law associated with collective bargaining, the role of IEERB and its rules and procedures, 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 meet-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**

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, control rumors, effectively evaluate employees, encourage teamwork, and promote personal improvement. Study methods to successfully manage difficult people. **Course Number: HR115**

Group Health/Medical Insurance (3 hours, Required – CBO, ACBO, HR / Elective - BOS, FD)

The course 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, Affordable Care Act, HIPPA, COBRA, dental, vision, life, LTD, and long term care. **Course Number: HR 116**

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**

Human Resources Administration (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD)

Designed for the 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: HR210**

Group Unemployment & Disability Insurance (3 hours, Required – HR / Elective – CBO, ACBO, BOS, FD)

Group unemployment insurance, group and personal disability insurance, and state unemployment insurance will be covered in detail. Find out how to process workers' compensation and disability claims, as well as keep the payroll office appropriately notified. Discover 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**

OTHER

IASBO Seminars (CBO -10 hours; ACBO – 5 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 – 9 hours; FD – 12 hours; HR – 9 hours):

Any certification course taken outside the required certification track. There are several elective courses recommended for each certification track.