



Michigan School Business Officials

# 2017–18

## CALENDAR OF EVENTS

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# Conferences and Workshops

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All MSBO conferences and workshops qualify for certification renewal credit.

## June 6, 2017

### Financial Statement Preparation Workshop

Kellogg Center, East Lansing

8:45 AM – 4:00 PM

Pricing: \$155 members/\$220 nonmembers

Statement of Auditing Standards #112 requires school districts to be able to prepare their own financial statements. If a district cannot prepare their own, they have a control deficiency. This CPA-designed workshop gives schools the information they need to satisfy this requirement. Your professional reputation and higher auditing fees may be “on the line.” Annual attendance will help you meet this requirement.

*Lodging at Kellogg Center: details under “Lodging Information.” Please book your room by May 6, 2017 to get the special MSBO rate.*

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## June 7, 2017

### Business Manager/CPA Workshop

Kellogg Center, East Lansing

Early Bird Session: 7:30 AM – 8:40 AM

Main Session: 9:00 AM – 4:00 PM

Pricing: Early Bird: \$30 members/\$35 nonmembers; Main Session: \$155 members/\$220 nonmembers

Timely information for practicing CPAs and business managers in preparing for successful year-end and financial statement preparation is the focus of this workshop. Important topics include reporting issues and concerns from the state’s audit reviews, accounting and auditing related updates, key compliance and finance-related issues, data submission issues, Bulletin 1022 Chart of Accounts and State Aid computation, Michigan School Auditing Manual, and GASB updates.

The Early Bird Session consists of information targeted for practicing CPAs. This additional session rounds out a full 8 hours of CPE for practicing CPAs.

*Lodging at Kellogg Center: details under “Lodging Information.” Please book your room by May 6, 2017 to get the special MSBO rate.*

# Conferences and Workshops

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**July 11, 2017**

## **MSBO Annual Golf Outing**

Forest Akers, East Lansing

8:00 AM – 5:00 PM

Pricing: \$45 members

Enjoy 18 holes with your colleagues for this day of fun and networking. Included is 18 holes of golf, lunch, dinner, and many prizes. This event is for members and sponsors only. For sponsorship information, contact Deneen Hansen at 517.327.2585.

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**July 18, 2017**

## **“Hands-On” Property Tax Workshop**

MSBO, Lansing

8:45 AM – 3:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Bring your district-specific information and learn how to complete the necessary documents for property tax levies and reimbursements. Presenters will help you with the forms used for levying your district millages, discuss how the levy impacts the state aid calculation and work with you on how to reconcile your overall tax revenues. This workshop will help both K-12 and ISDs.

*Use for elective credit for MSBO Certification.*

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**August 17, 2017**

## **Back to School Workshop**

Webinar (watch at your desk) or attend in person at MSBO, Lansing

8:45 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers regular pricing

Get the latest information you need to prepare for your year ahead at this special “Back to School” workshop. Start the school year without any surprises. Learn about the most important aspects of the Family Medical Leave Act (FMLA), Fair Labor Standards Act (FLSA), Freedom of Information Act (FOIA), the Affordable Care Act, and more at this special day-long workshop. Don’t get left in the dark — get the information you need to keep your district on track!



# Conferences and Workshops

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## September 14 – 15, 2017

### School Finance Services Committee — Northern Michigan Workshop

Treetops Resort, Gaylord

September 14: Reception: 6:00 PM; Dinner: 7:00 PM

September 15: Breakfast: 7:30 AM; Meeting: 8:30 AM – 12:30 PM

**Pricing: No charge for reception; \$30 for dinner; No charge for Breakfast/Meeting**

The school year kicks off with MSBO's annual meeting in Northern Michigan. Get useful information on the latest "hot topics" facing public education, including a legislative and state aid update.

This relaxing meeting is always informative. You will have a chance to network with colleagues and regenerate before digging back into the piles of work you have waiting for you!

***Lodging at Treetops Resort, Gaylord; details under "Lodging Information." Rate expires August 13, 2017.***

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## October 10 – 11, 2017

### Group Solutions — Current Issues

DoubleTree by Hilton, Bay City

October 10 Meeting: 1:30 – 5:15 PM; Reception and Dinner: 5:30 – 7:00 PM

October 11 Breakfast: 8:00 – 8:45 AM; Meeting: 8:45 AM – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Experienced business managers share their thoughts and experiences as they facilitate discussions on challenging topics facing today's current issues. Focus is on hands-on business office self-assessment, discussion, real-world problem solving, and networking especially geared toward local district business managers.

Get straight talk, advice, and professional support to assist you in understanding the forces that make your position one of the most challenging in public education. Learn from other professionals facing the same issues you are, and together develop practical solutions.

Lodging at DoubleTree by Hilton; details under "Lodging Info." Rate expires September 20, 2017.

*\* Meets one-half (6.5 hours) of your Group Solutions renewal requirement for members who hold CFO and/or BOM designation. This course is required twice in a five-year period to renew your certificate.*

*See future dates on page 10.*

# Conferences and Workshops

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## Future Group Solutions — Current Issues Dates:

February 6, 2018 • Cadillac

October 9 – 10, 2018 • Thompsonville

February 6, 2019 • Birmingham

October 10 – 11, 2019 • Lewiston

February 4, 2020 • Lansing

October 8 – 9, 2020 • Muskegon

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## October 24, 2017

### MDE/MSBO Workshop

Kellogg Center, East Lansing

8:30 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Get the latest from the Michigan Department of Education (MDE) on state aid, 1022, and other hot topics. Take advantage of this opportunity to meet face-to-face with the people at MDE you work with all year.

*Lodging at Kellogg Center; details under “Lodging Information.” Rate expires September 22, 2017.*

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## 2018

### MSBO Leadership Institute

Five 2-day sessions TBD

Registration available December 2017

Pricing: \$1,500

The MSBO Leadership Institute is designed to help members reach that next level in their professional and personal life through a rigorous and challenging curriculum that will help them grow as leaders and implement solutions. It includes face-to-face group sessions focusing on specific leadership themes, small group learning and individual personal coaching sessions.

*This program can take the place of the Group Solutions requirement for CFO and BOM certifications, yet is designed for all members who have completed at least one certification program. Enrollment is limited and based on an application process and acceptance into the program.*

# Conferences and Workshops

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## January 16 – 17, 2018

### Financial Strategies Conference

Amway Grand Plaza Hotel, Grand Rapids

January 16: 9:00 AM – 4:00 PM; January 17: 9:00 AM – 3:30 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$320 members/\$480 nonmembers

**Regular Pricing:** \$340 members/\$500 nonmembers

The Financial Strategies Conference provides useful information just in time for negotiations and your budget process – tools that will help maximize your effectiveness as your district’s school business leader. Get the latest information on economy, budget, state aid, legislation and other hot topics. Includes two breakfasts and two lunches.

**Lodging at Amway Grand Plaza Hotel; details under “Lodging Info.” Rate expires December 15, 2017.**

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## February 6, 2018

### Group Solutions — Current Issues

Evergreen Resort, Cadillac

8:00 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Experienced business managers will share their thoughts and experiences as they facilitate discussions on challenging topics facing today’s current issues. Focus will be on hands-on business office self-assessment, discussion, real-world problem solving, and networking especially geared toward local district business managers.

Get straight talk, advice, and professional support to assist you in understanding the forces that make your position one of the most challenging in public education. Learn from other professionals facing the same issues you are, and together develop practical solutions.

Lodging at Evergreen Resort; details under “Lodging Information.” Rate expires January 6, 2018.

*\* Meets one-half (6.5 hours) of your Group Solutions renewal requirement for members who hold CFO and/or BOM designation. This course is required twice in a five-year period to renew your certificate.*

*See future dates on page 12.*

# Conferences and Workshops

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## Future Group Solutions — Current Issues Dates:

October 9 – 10, 2018 • Thompsonville

February 6, 2019 • Birmingham

October 10 – 11, 2019 • Lewiston

February 4, 2020 • Lansing

October 8 – 9, 2020 • Muskegon

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## February 28, 2018

### Property Tax Overview

Webinar (watch at your desk) or attend in person at MSBO, Lansing

8:45 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

With the ever changing environment of property tax laws, rules and regulations, do you have the latest information? Learn the basics of how property taxes affect your districts funding, as well as a more advanced look at specific tax and other tax financing methods. Forms used for levying your district millages, how the levy impacts the State Aid calculation and details on how to reconcile your overall tax revenues is part of this workshop. Presenters include property tax experts and school practitioners and content is geared for both K-12 and ISDs.

*Use for elective credit for MSBO Certification.*

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## April 17 – 19, 2018

### MSBO Annual Conference & Exhibit Show

Cobo Center, Detroit

Join us at MSBO's 80th Annual Conference. On Tuesday, April 17, we'll have certification classes and pre-conferences, followed by the Conference and Exhibit Show on April 18 – 19. Get the latest information on the economy, best practices in school districts, school aid, legal issues and products and services. We look forward to seeing you in Detroit!

**Registration is done separately.**

# Conferences and Workshops

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**June 5, 2018**

## **Financial Statement Preparation Workshop**

Kellogg Center, East Lansing

8:45 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Statement of Auditing Standards #112 requires school districts to be able to prepare their own financial statements. If a district cannot prepare their own, they have a control deficiency. This workshop is designed by CPAs to give schools the information they need to satisfy this requirement. Your professional reputation and higher auditing fees may be “on the line.” Annual attendance will help you meet this requirement.

*Lodging at Kellogg Center: details under “Lodging Information.” Rate expires May 4, 2018.*

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**June 6, 2018**

## **Business Manager/CPA Workshop**

Kellogg Center, East Lansing

**Early Bird Session:** 7:30 AM – 8:40 AM; **Main Session:** 9:00 AM – 4:00 PM

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **Early Bird Session:** \$30 members/\$35 nonmembers; **Main Session:** \$160 members/\$240 nonmembers

**Regular Pricing:** **Early Bird Session:** \$30 members/\$35 nonmembers; **Main Session:** \$170 members/\$250 nonmembers

Timely information for practicing CPAs and business managers in preparing for successful year-end and financial statement preparation is the focus of the Business Manager/CPA Workshop. Important topics include reporting issues and concerns from the state’s audit reviews, accounting and auditing related updates, key compliance and finance-related issues, data submission issues, Bulletin 1022 Chart of Accounts and State Aid computation, Michigan School Auditing Manual, and GASB updates.

The Early Bird Session consists of information targeted for practicing CPAs. This additional session rounds out a full 8 hours of CPE for practicing CPAs.

*Lodging at Kellogg Center: details under “Lodging Information.” Rate expires May 4, 2018.*

# Environmental Workshops

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July 19 – 20, 2017

## **Certified Pool Operator's Course**

MSBO, Lansing

8:00 AM – 4:30 PM Each Day

Pricing: \$350

Everything you need to know about pool operation, maintenance, and management. The curriculum is prepared by the National Swimming Pool Foundation and prepares participants for the certification exam.

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September 7, 2017

## **AHERA Designated Person Training**

MSBO, Lansing

8:00 AM – 5:00 PM

Pricing: \$150

Many school districts and other employers do not have a designated person or have not provided training for the current designated person in asbestos handling. It is a requirement of the EPA that a designated person receive "adequate" training to manage the asbestos program. This one-day workshop will provide an excellent knowledge base of the AHERA law and a common sense approach to managing asbestos and the asbestos written plan.

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October 17 – 18, 2017

## **AHERA Operations & Maintenance Personnel Training**

MSBO, Lansing

Each day 8:00 AM – 5:00 PM

Pricing: \$295

Your district is required to provide a total of 16 hours of asbestos training to any employee who will conduct activities that will disturb asbestos containing building materials (ACBM). Employees who perform work on heating systems, electrical systems, plumbing, and in other areas where ACBM is present should receive this training. Any new employees are required to have this training prior to performing any work involving asbestos.

# Environmental Workshops

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**December 15, 2017**

## **AHERA Inspectors & Management Planners Training**

Oakland Schools, Waterford

8:00 AM – 5:00 PM

Pricing: Full Day: \$150/Half Day Refresher: \$75

This annual refresher course is for persons who are accredited inspectors and management planners through an Environmental Protection Agency (EPA) approved training program. The EPA requires reaccreditation of inspectors and management planners who perform work under the Asbestos Hazard Emergency Response Act (AHERA). To maintain your status as an accredited inspector you must attend the annual half day (4 hours) reaccreditation training, plus an additional half day of training for the management planner reaccreditation.

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**January 10, 2018**

## **AHERA Designated Person Training**

MSBO, Lansing

8:00 AM – 5:00 PM

Pricing: \$150

Many school districts and other employers do not have a designated person or have not provided training for the current designated person in asbestos handling. It is a requirement of the EPA that a designated person receive “adequate” training to manage the asbestos program. This one-day workshop will provide an excellent knowledge base of the AHERA law and a common sense approach to managing asbestos and the asbestos written plan.

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**April 10, 2018**

## **AHERA Designated Person Training**

MSBO, Lansing

8:00 AM – 5:00 PM

Pricing: \$150

Many school districts and other employers do not have a designated person or have not provided training for the current designated person in asbestos handling. It is a requirement of the EPA that a designated person receive “adequate” training to manage the asbestos program. This one-day workshop will provide an excellent knowledge base of the AHERA law and a common sense approach to managing asbestos and the asbestos written plan.

# Environmental Workshops

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April 12, 2018

## **AHERA Inspectors & Management Planners Training**

MSBO, Lansing;

8:00 AM – 5:00 PM

**Pricing: Full Day: \$150/Half Day Refresher: \$75**

This annual refresher course is for persons who are accredited inspectors and management planners through an Environmental Protection Agency (EPA) approved training program. The EPA requires reaccreditation of inspectors and management planners who perform work under the Asbestos Hazard Emergency Response Act (AHERA). To maintain your status as an accredited inspector you must attend the annual half day (4 hours) reaccreditation training, plus an additional half day of training for the management planner reaccreditation.



# Certification Classes

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**September 20 – 21, 2017**

## **Introduction to School Business**

**Kellogg Center, East Lansing**

**September 20 Session: 8:45 AM – 5:00 PM**

**September 21 Breakfast: 7:00 – 8:00 AM; Session: 8:00 AM – 4:30 PM**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$320 members/\$480 nonmembers**

**Regular Pricing: \$340 members/\$500 nonmembers**

The Introduction to School Business Conference is designed for new business officials (within the first few years of employment), office staff, and those who want a basic information refresher.

### **Program content includes:**

- Overview of School Business: Get an understanding of the major functions of school business officials including an overview of human resources and technology. Learn how to survive the personal and professional politics of your job, and learn how the Michigan Department of Education and the Michigan Legislature affect education.
- School Law and Revised School Code: an overview of the major state and federal laws that govern school operations with a focus on the Revised School Code.
- Fund Accounting: An overview of fund accounting concepts, financial reporting issues, & highlights the fiscal health attributes used by savvy business managers.
- Organizational and Site Issues: How to enhance business office productivity; monitor & manage your budget and operation; work with your site operation's personnel (principals, cafeteria, facilities and transportation offices).

***Lodging at Kellogg Center; details under "Lodging Information." Rate expires August 18, 2017.***

*R=Business Office Manager, Business Office Specialist, Certified Purchasing Officer, Chief Financial Officer, Human Resource Specialist, and School Payroll Specialist E=all others*



# Certification Classes

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September 26, 2017

## Technology in the Classroom

Presenter(s): Sherry McVay, Dewitt Public Schools

MSBO, Lansing

8:45 am – 4:00 pm

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

School technology directors need to know the traditional technology management skills and be “tuned in” to the unique environment that is the modern classroom. Become familiar with technology and curriculum standards that are the driving force for the tools and support needed from tech staff in classrooms. Tools, ranging from virtual classrooms to mobile devices and online assessment, will be included in this discussion, along with sharing of information about how to leverage resources to budget and support classroom needs.

*R=Chief Technology Officer E=all others*

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October 1 – 3, 2017

## 19th Annual Facilities/Operations Director Conference & Expo

Crystal Mountain Resort, Thompsonville

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$265 members/\$340 nonmembers

**Regular Pricing:** \$280 members/\$370 nonmembers

This conference provides in-depth information on all important current school facilities topics. School buildings are the largest financial asset of a district. Maintaining them properly is critical to successful educational programs and this conference provides the necessary information to do it right. This is a valuable conference for facilities and operations directors as well as superintendents and business managers.

More than 30 sessions will be offered.

**Registration is done separately.**

*R=Facilities Director and Operations Director E=all others*

***Lodging at Crystal Mountain Resort; details under “Lodging Information.” Rate expires August 31, 2017.***



# Certification Classes

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October 12 – 13, 2017

## Preparing Your Financial Picture (Formerly Revenue Part 1 & 2)

MSBO, Lansing

8:45 AM – 4:00 PM Each Day

Early Bird Pricing (*Up to two weeks prior to the event.*): \$320 members/\$480 nonmembers per day

Regular Pricing: \$170 members/\$250 nonmembers

A chief financial officer's predominant job focus is preparing, managing, and executing a school district's budget. Understand the application of enrollment projections, budget assumptions in developing a budget as well as major revenues and expenses that comprise a school budget. Learn practical ways to amend budgets, presentation of budgets to staff, the board of education, and community. Group work will focus on building a budget, sharing details, and simulating board and community presentations of a budget. Details of a school district's yearly audit process will also be highlighted.

*R=Chief Financial Officer E=all others*



# Certification Classes

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October 17, 2017

## Team Leadership

*Presenter: David Hulings, Hulings & Associates, L.L.C.*

MSBO, Lansing

8:45 am – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Learn how to match your leadership style with the culture of your organization. Matching leadership style to the cultural landscape will allow you to increase your productivity, decrease communication problems and strengthen your conflict management skills.

*R=all tracks E= School Payroll Specialist*

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October 17, 2017

## Data Quality I

*Presenter: Rob Dickinson, MPAAA*

MSBO, Lansing

12:45 pm – 4:00 pm

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

A culture of data quality is the belief that good data is an integral part of teaching, learning, and operating your school. Data Quality I provides the initial foundational building blocks related to creating a culture of data quality. Identify the components of data quality, factors affecting data quality, collaboration opportunities, security and confidentiality, and the elements of a data audit.

*R=Pupil Accounting Auditor, Pupil Accounting Specialist, Specialist in Educational Data E=all others*



# Certification Classes

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October 27, 2017

## Purchasing Advanced

MSBO, Lansing

8:45 am – 4:00 pm

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Learn the fundamentals of various legal issues that affect purchasing including Bid, Performance and Payment Bonds; contractor insurance coverage to mitigate risk; School Safety Requirements for contractors; ethics, Federal contract requirements, Freedom of Information (FOIA) requests; and records retention.

*R=Certified Purchasing Officer E=all others*

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November 1, 2017

## Strategic Planning

MSBO, Lansing

*Presenter: Larry Thomas, Oakland Schools*

8:45 am – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Participate in identifying short- and long-term goals in all aspects of school district activities. Explore opportunities for your school district through current research, practices and datasets. A strategic plan moves the district toward the achievement of its mission and goals. Facilitate the strategic planning process and assisting in the implementation, monitoring, evaluation, reporting, and revision of a strategic plan.

*R=Chief Financial Officer and Operations Director E=all others*

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# Certification Classes

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**November 1, 2017**

## **Bonding/Borrowing/Investing**

MSBO, Lansing

*Presenter(s): Brenda Voutyras and Jeffrey Zylstra, Stifel Nicolaus, Jeffrey Soles, Thrun Law Firm, P.C. and Paul Stauder, Public Financial Management, Inc.*

12:45 pm – 4:00 pm

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Examine legal and practical issues relating to how school districts bond, borrow, and invest funds. Get an overview of cash flow analysis, arbitrage, and general borrowing and investing options.

*R=Chief Financial Officer E=all others*

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**November 28, 2017**

## **Year-End Payroll: Payroll & Tax Returns (941), W-2s, etc.**

MSBO, Lansing

8:45 am – 4:00 pm

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$160 members/\$240 nonmembers

**Regular Pricing:** \$170 members/\$250 nonmembers

Understand the 941's, W-2's, tax deposit requirements, business expense accounting, retirement incentives, and other related paperwork related to payroll. Learn how to track sick time accurately. Be aware of the payroll function as it relates to automation, i.e. EFT, garnishments, and vendors. Know the difference between salary and hourly employees and how the payroll function may change.

*R=School Payroll Specialist E=all others*



# Certification Classes

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## December 5, 2017

### Purchasing Overview

*Presenter(s): Jeremy Motz, Clark Hill, PC and Sandra Elka, Huron Valley Schools*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

Learn the basics of performing the purchasing function, including: related Michigan laws, the structure of a purchasing operation, electronic and cooperative purchasing, bidding, reviewing contracts, lease-purchase options, and “partnerships.”

*R=Chief Financial Officer, Facilities Director, and Business Office Manager E=all others*

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## December 7, 2017

### Payroll and Related Personnel Issues

*Presenter(s): Kim Bruske and Chris Frank, Saginaw ISD and Kristi Krafft-Bellsky, Yeo & Yeo, P.C.*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

Know the laws and regulations related to the payroll function, including state and federal payroll laws and regulations, pertinent tax regulations, employee retirement plans, practical aspects of completing a payroll, and electronic check deposits.

*R=Chief Financial Officer and Business Office Manager E=all others*



# Certification Classes

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December 13, 2017

## Technology Policies

*Presenter(s): Susan Bordewyk and Jon Tilma, Forest Hills Public Schools and Ryan Nicholson, Thrun Law Firm, P.C.*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

Get an overview of the policies and procedures that should be in place, including Acceptable Use Policies (AUP), network policies, e-mails, filtering of network, listservs, laptops, copyright, licensing, and software selection policies. Understand asset management, Web publishing, and the Children's Internet Protection Act (CIPA).

*R=Chief Technology Officer and Specialist in Educational Data E=all others*

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January 11, 2018

## Financial Analysis

*Presenter(s): Scott Little, MSBO*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

The focus of this class is primarily to provide facilities directors with ideas and terminology that can help them analyze and communicate issues in their operations from a cost perspective. We will cover life cycle costing concepts, but we'll also look at facilities benchmarks, energy management, marketing and reporting on the facilities department.

*R=Facilities Director E=all others*





# Certification Classes

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**January 18, 2018**

## **Accident Investigation Procedures**

Webinar (online seminar) — Watch at Your Desk

8:45 am – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Learn what to look for at the accident scene, what information to gather and rules and regulations of reporting accidents and how to analyze data. Understand how to respond to media both from routine inquiries and when suddenly faced with a television crew.

*R=Transportation Director E=all others*

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**January 23, 2018**

## **Technology for the Business Manager**

*Presenter(s): Brian Schupbach and Scott Thomas, Kalamazoo RESA*

Webinar (online seminar) — Watch at Your Desk

8:45 am – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Learn how to develop long-range technology planning, while assigning appropriate specifications for technology purchasing. Other topics include: technology infrastructure contracting for the school district, evaluating the cost benefits of producing information in relation to organizational value, and ensuring that appropriate security is maintained.

*R=Chief Financial Officer and Business Office Manager E=all others*



# Certification Classes

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**January 30, 2018**

## **Facilities for the Business Manager**

*Presenters: Steve Lenar, Holly Area Schools and Scott Little, MSBO*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

Understand the basic structure and function of building, grounds and maintenance operations as well as the planning of maintenance programs. Learn about laws relating to school construction, environmental regulations, and what to expect from your facilities director.

*R=Chief Financial Officer E=all others*

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**February 6, 2018**

## **Transportation for the Business Manager**

*Presenter: Lori Richardson, Oakland Schools*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

The basic structure and function of a transportation department, equipment supply and purchase, and laws related to transportation.

*R=Chief Financial Officer E=all others*

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# Certification Classes

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**February 13, 2018**

## **Food Service for the Business Manager**

*Presenter: Lori Adkins, Oakland Schools and Carolyn Thomas, Macomb ISD*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

The basic structure and function of a food services program, food safety issues, vending and contracting for food services, and cooperative ventures.

*R=Chief Financial Officer E=all others*

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**February 20, 2018**

## **Insurance and Risk Management**

*Presenter(s): Bob Donaldson and Travis VanTighem, SET SEG*

**Webinar (online seminar) — Watch at Your Desk**

**8:45 am – noon**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$90 members/\$140 nonmembers**

**Regular Pricing: \$95 members/\$150 nonmembers**

Review of the insurances necessary for school operations with a primary focus on: Worker's Compensation, cafeteria plans, property/casualty, health insurance, liability insurance, errors and omissions, and methods of risk management. A portion of the program would be devoted to understanding options for purchasing insurance: pools, cooperatives, private vendors, and self-insurance.

*R=Chief Financial Officer E=all others*

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# Certification Classes

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**February 21, 2018**

## **Enterprise Software Applications**

Webinar (online seminar) — Watch at Your Desk

8:45 am – noon

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

Software for school business operations. Specific areas covered include software for: financial operations, human resources and general business, transportation, food service and facility management.

*R=Chief Technology Officer E=all others*

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**March 8, 2018**

## **Team Leadership (AM and PM repeated)**

*Presenter: David Hulings, Hulings & Associates, L.L.C.*

Lansing Community College — West Campus

**Early Bird Pricing** (*Up to two weeks prior to the event.*): \$90 members/\$140 nonmembers

**Regular Pricing:** \$95 members/\$150 nonmembers

8:45 am – noon or 12:45 – 4:00 pm

Learn how to match your leadership style with the culture of your organization. Matching leadership style to the cultural landscape will allow you to increase you productivity, decrease communication problems and strengthen your conflict management skills.

*R=all tracks Elective=School Payroll Specialist*



# Certification Classes

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**March 21, 2018**

## **Labor Relations/Employment Law**

*Presenter(s): Thrun Law Firm, P.C.*

**Lansing Community College — West Campus**

**8:45 am – 4:00 pm**

**Early Bird Pricing** (*Up to two weeks prior to the event.*): **\$160 members/\$240 nonmembers**

**Regular Pricing: \$170 members/\$250 nonmembers**

Understand the major state and federal employment laws that apply to public schools. This includes: collective bargaining, wage and hour, discrimination, COBRA, Family Medical Leave Act, and federal and state retirement issues.

*R=Chief Financial Officer, Transportation Director, Child Nutrition Director, Operations Directors, Human Resources Specialist, Business Office Manager E=all others*



# Certification Program

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**M**SBO Certification is a voluntary program, established in 1998 by the Michigan School Business Officials (MSBO). It provides focused training to school business officials in order to:

- 1) Offer practical information that will help school business officials succeed and excel in their employment; and,
- 2) Establish a basis for advancing professionalism of school business officials and assuring school districts that current or prospective business officials have a base of knowledge about laws, regulations, and procedures.

## Who may become certified?

Any current MSBO member may become certified. MSBO has designed 14 different certification tracks, each specific to the specialty.

- Business Office Manager
- Business Office Specialist
- Certified Purchasing Officer
- Chief Financial Officer
- Chief Technology Officer
- Child Nutrition Director
- Facilities Director
- Human Resource Specialist
- Operations Director
- Pupil Accounting Auditor
- Pupil Accounting Specialist
- School Payroll Specialist
- Specialist in Educational Data
- Transportation Director

## Why should I become certified?

Obtaining certification demonstrates a dedication to your profession and offers a base of useful information taught by seasoned practitioners. School districts that hire business officials believe certification matters.

The MSBO Certification Program has been endorsed by the Michigan Association of School Administrators and Michigan Association of School Boards.



# Certification Program

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## Do I qualify?

Requirements vary for each of the 14 certification tracks. Each program will be offered by MSBO or in partnership with other organizations.

Applicants for certification may apply to use college classes or seminars to meet subject area requirements. Credit for non-MSBO sponsored programs will be allowed at the discretion of MSBO on a case-by-case basis. Contact MSBO for additional information at [dkopkau@msbo.org](mailto:dkopkau@msbo.org) or [cbyam@msbo.org](mailto:cbyam@msbo.org).

## How do I Apply?

When you wish to begin the certification process fill out and return the “Letter of Commitment” to MSBO. You must complete the certification program within three years of taking your first class, unless you obtain a waiver.

## Are there continuing education requirements?

Continuing education requirements must be approved, job-related education and the following must be completed within a five-calendar-year period:

- 150 hours for CFO — 150 SCECHs or six (6) college semester credit hours; or
- 90 hours for all other tracks — 90 SCECHs or three (3) college semester credit hours.
- For holders of Chief Financial Officer and Business Office Manager Certificates, you must attend 13 hours of Group Solutions Seminars during your five-calendar-year renewal period or enroll and complete the MSBO Leadership Institute (The MSBO Leadership Institute can be used in place of the Group Solutions requirement. It is a one-year program, which you must be accepted into and attend all sessions to qualify.)
- You must maintain Active MSBO membership, as well as be employed in a Michigan public school.

There is a \$60 fee for initial certification and \$30 fee every five (5) years for continuing certification. All records are maintained by MSBO.

## Other Questions? Contact:

**Debbie Kopkau**  
Director of Certification  
[dkopkau@msbo.org](mailto:dkopkau@msbo.org)  
517.327.2587

**Courtney Byam**  
Certification Coordinator  
[cbyam@msbo.org](mailto:cbyam@msbo.org)  
517.327.5937



# Certification Track Requirements

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Certification courses are offered through MSBO or in partnership with other organizations. In some circumstances courses from other sources may be counted toward MSBO certification. Please be aware that some courses and/or requirements may change. MSBO and the committees that created this program are continuing to evaluate and make minor modifications as deemed appropriate.

This certification program and its courses have been created and reviewed by the Professional Development Committee of MSBO in conjunction with the Facilities Management, Food Service, Transportation, and Technology Committees. An applicant for certification must be a member of MSBO.

MSBO certification courses provide a great deal of information in a short time. Most courses are “bulleted” information rather than in-depth training. They are intended to cover major points about their respective topics, offer an opportunity for questions and discussion, and provide resource information for future use.

Although anyone may benefit from certification courses, the full program is generally intended for people in their first 1-5 years of employment. However, any person employed in school business operations who meets the stated requirements may receive certification. There is no requirement for holding a particular position in a school district.

For those who already have more experience, MSBO will evaluate their background to determine how much additional training is required prior to granting certification.





# Certification Track Requirements

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## Business Office Manager (BOM)

**Includes:** Purchasing, Personnel, and Payroll

Business office managers are people employed in directing one or more of the functional areas in a school business office — payroll, purchasing, personnel, and technology are primary examples. A business office manager typically reports to the chief financial officer of a school district or a superintendent who serves in that capacity.

**Degree required:** BA/BS or equivalent

**Required class hours:** 52

**Accounting hours:** 8 college semester hours

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years, 77 hours and 13 hours of Group Solutions or the MSBO Leadership Institute

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Business Office Manager Courses:

- Cash Management (3 hours)
- Collective Bargaining Agreement, Contracts (3 hours)
- Effective Communications (3 hours)\*
- Introduction to School Business (14 hours)
- Labor Relations/Employment Law (6 hours)
- Payroll and Related Personnel Issues (3 hours)
- Principles of Education (3 hours)\*
- Purchasing Overview (3 hours)
- Team Leadership (3 hours)
- Technology for the Business Manager (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered each year at the MSBO Annual Conference.*

Total class time is 52 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 77 hours plus 13 hours of Group Solutions or the MSBO Leadership Institute. Continuing education hours must be completed within a five-calendar-year period.

# Certification Track Requirements

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## Business Office Specialist (BOS)

**Includes:** Day-to-day business functions

Business office specialists are people employed in one or more of the functional areas in a school business office — payroll, purchasing, personnel, and technology are primary examples. A business office specialist typically reports to the chief financial officer or business office manager of a school district.

**Degree required:** Associate or equivalent

**Required class hours:** 34

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Business Office Specialist Courses:

- Cash Management (3 hours)
- Collective Bargaining Agreement, Contracts (3 hours)
- Introduction to School Business (14 hours)
- Principles of Education (3 hours)\*
- Team Leadership (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

\*Offered each year at the MSBO Annual Conference.

Total class time is 34 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Certified Purchasing Officer (CPO)

**Includes:** Purchasing Managers, Supervisors and those who are responsible for Purchasing

**Degree required:** Associate or equivalent

**Required class hours:** 52

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Certified Purchasing Officer Courses:

- Developing and Managing RFPs (6 hours)
- Effective Communications (3 hours)\*
- How to Process and Evaluate Bids (3 hours)
- Introduction to School Business (14 hours)
- Principles of Contract Writing (3 hours)
- Principles of Education (3 hours)\*
- Purchasing Overview (3 hours)
- Purchasing Advanced (6 hours)
- Team Leadership (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken outside of this certification track but required in another.

*\*Offered each year at the MSBO Annual Conference.*

Total class time is up to 52 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Chief Financial Officer (CFO)

**Includes:** Business Office, Transportation, Personnel, Food Service, Facilities, and Technology

This program is intended for any person employed in school business who meets the stated prerequisites. There is no requirement for holding a particular position in a school district.

**Degree required:** BA/BS

**Required class hours:** 85

**Accounting hours required:** 18 college semester hours

**Grandparent provision:** No

**Continuing education requirement:** 150 hours over five years. 137 hours and the 13 hours of Group Solutions or the MSBO Leadership Institute.

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Chief Financial Officer Courses:

- Bonding/Borrowing/Investing (3 hours)
- Cash Management (3 hours)
- Collective Bargaining Agreement, Contracts (3 hours)
- Effective Communications (3 hours)\*
- Facilities for the Business Manager (3 hours)
- Food Service for the Business Manager (3 hours)
- Instructional Program Evaluation (3 hours)
- Insurance and Risk Management (3 hours)
- Introduction to School Business (14 hours)
- Labor Relations/Employment Law (6 hours)
- Payroll and Related Personnel Issues (3 hours)
- Principles of Education (3 hours)\*
- Purchasing Overview (3 hours)
- Revenue, Expenditures and Budgeting Part I and Part II (6 hours each)
- Strategic Planning (3 hours)
- Team Leadership (3 hours)
- Technology for the Business Manager (3 hours)
- Transportation for the Business Manager (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered each year at the MSBO Annual Conference.*

Total class time is 85 hours. These hours must be completed within a three-calendar-year period. Continuing education hours are 137 hours plus 13 hours of Group Solutions or the MSBO Leadership Institute. Continuing education hours must be completed within a five-calendar-year period.

# Certification Track Requirements

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## Chief Technology Officer (CTO)

**Includes:** Technology Use for Student Access and District Personnel

**Degree required:** BA/BS or equivalent

**Required class hours:** 59

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Chief Technology Officer Courses:

- Effective Communications\* (3 hours)
- Enterprise Software Applications (3 hours)
- Performance Evaluations for Personnel (3 hours)
- Organizational Applications (3 hours) *formerly Student Services Software Applications in Education*
- Organizational Technology Audits (3 hours)
- Overview of School Finance for Technology (3 hours)
- Principles of Education\* (3 hours)
- Security/Disaster Recovery (3 hours)
- Team Leadership (3 hours)
- Technology in Education (6 hours)
- Technology Policies (3 hours)
- Technology in the Classroom (6 hours)
- Time Management (3 hours)
- Vision, Strategic Planning & Implementation (6 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered every year at the MSBO Annual Conference.*

Total class time is 59 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Child Nutrition Director (CND)

**Includes:** Menu Planning and Nutrition of Students

**Degree required:** None

**Required class hours:** Up to 63

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

Many classes offered by School Nutrition Association of Michigan (SNAM), [www.michigansna.org](http://www.michigansna.org).

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## Child Nutrition Director Courses:

The following courses must be completed:

- Financial Management (14 hours)
- Food Service Program Accountability (3 hours)
- Labor Relations/Employment Law (6 hours)
- Nutrition I (10 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (3 hours): Any course taken that is not required in this track, but is required in another

Select one of the Communications courses from the following list:

- Effective Communications (3 hours)\*
- Team Leadership (3 hours)
- Verbal Communication Skills (3 hours)
- Dealing with Conflict in the Workplace (3 hours)

Select one of the Food Safety courses from the following list:

- Sanitation and Food Safety (10 hours)
- ServSafe® (12 hours)

Select one of the Meal Basics courses from the following list:

- School Meal Program Requirements (10 hours)
- Introduction to School Food Service (10 hours)

\*Offered each year at the MSBO Annual Conference.

Total class time is up to 63 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Facilities Director (CFD)

**Includes:** Buildings, Grounds, and Maintenance

**Degree required:** None

**Required class hours:** 56

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Facilities Director Courses:

- Budget (3 hours)
- Computerized Facility Management (3 hours)
- Custodial Operations (3 hours)
- Effective Communications (3 hours)\*
- Emergency Preparedness Management (3 hours)
- Environmental Health and Safety (3 hours)
- Facility Planning, Design and Construction (3 hours)
- Financial Analysis (3 hours)
- Introduction to Facilities Management (3 hours)
- Maintenance Operations (3 hours)
- Performance Evaluations for Personnel (3 hours)
- Principles of Education (3 hours)\*
- Purchasing Overview (3 hours)
- Systems — HVAC, Electrical, and Technology (3 hours)
- Team Leadership (3 hours)
- Utilities and Energy Efficiency (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered every year at the MSBO Annual Conference.*

Total class time is 56 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Human Resource Specialist (HRS)

**Includes:** Benefits, Training, Employee Evaluations, Personnel Records, and State Reporting.

Human resource specialists perform one or more of the functional areas in a school business office. A human resource specialist typically reports to the superintendent or his/her designee.

**Degree required:** Associate or equivalent

**Required class hours:** 61

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## Human Resource Specialist Courses:

- Benefits/Retirement (3 hours)
- Collective Bargaining Agreement, Contracts (3 hours)
- Effective Communications (3 hours)\*
- Introduction to School Business (14 hours)
- Labor Relations/Employment Law (6 hours)
- Overview of Human Resource Management (6 hours)
- Performance Evaluations for Personnel (3 hours)
- Principles of Education (3 hours)\*
- TDP, IRS Sec. 125, 403 (b), 457, and Workers Compensation (6 hours)
- Team Leadership (3 hours)
- Use of Technology for Human Resource Management (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered every year at MSBO Annual Conference.*

Total class time is 61 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.



# Certification Track Requirements

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## Operations Director (COD)

**Includes:** Transportation and Facilities Operations

**Degree required:** None

**Required class hours:** 80

**Grandparent provision:** Yes

**Continuing education requirement:**

90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conference participation, and specialized workshops.

Many classes offered in partnership with Michigan Association for Pupil Transportation (MAPT), [www.mapt.org](http://www.mapt.org).

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## Operations Director Courses:

- Basic Transportation Issues (18 hours)
- Budget (3 hours)
- Custodial Operations (3 hours)
- Effective Communications (3 hours)\*
- Facility Planning, Design and Construction (3 hours)
- Introduction to Operations Management (6 hours)
- Labor Relations/Employment Law (6 hours)
- Maintenance Operations (3 hours)
- Managing Emergencies (6 hours)
- Performance Evaluations for Personnel (3 hours)
- Principles of Education (3 hours)\*
- Strategic Planning (3 hours)
- Team Leadership (3 hours)
- Technology for Operational Management (6 hours)
- Time Management (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

\*Offered every year at MSBO Annual Conference.

Total class time is 80 hours. Continuing Education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Pupil Accounting Auditor (PAA)

**Includes:** Those responsible for auditing the data records of Michigan public school districts and public school academies

**Degree required:** Associate or equivalent

**Required class hours:** 50

**Required accounting hours:** None

**Grandparent provision:** Yes

**Continuing education requirement:**  
90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conference participation, and specialized workshops.

Many classes offered in partnership with Michigan Pupil Accounting and Attendance Association (MPAAA), [www.mpaaa.org](http://www.mpaaa.org).

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## Pupil Accounting Auditor Courses:

- Auditing I (3 hours)
  - Auditing II (3 hours)
  - Data Quality I (3 hours)
  - Days and Hours (3 hours)
  - Effective Communications (3 hours)\*
  - Introduction to CEPI (3 hours)
  - Introduction to Pupil Accounting I (3 hours)
  - Introduction to Pupil Auditing (3 hours)
  - Introduction to State Agency Resources (1 hour)
  - Principles of Education (3 hours)\*
  - Pupil Accounting Auditing Reporting (3 hours)
  - Pupil Accounting Auditors in Action (3 hours)
  - Pupil Accounting Legal Issues (2 hours)
  - Pupil Accounting Legislative Primer (3 hours)
  - Team Leadership (3 hours)
  - Wrap-up/Ethics (2 hours)\*
  - Elective (6 hours): Any course taken outside of this certification track.
- \*Offered every year at MSBO Annual Conference.*

Total class time is 50 hours. Continuing Education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Pupil Accounting Specialist (PAS)

**Includes:** Those responsible for maintaining pupil accounting records and required submissions in compliance with the School Aid Act

**Degree required:** None

**Required class hours:** 50

**Required accounting hours:** None

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conference participation, and specialized workshops.

Many classes offered in partnership with Michigan Pupil Accounting and Attendance Association (MPAAA), [www.mpaaa.org](http://www.mpaaa.org).

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## Pupil Accounting Specialist Courses:

- Data Quality I (3 hours)
- Data Quality II (3 hours)
- Days and Hours (3 hours)
- Effective Communications (3 hours)\*
- Introduction to CEPI (3 hours)
- Introduction to Pupil Accounting I (3 hours)
- Introduction to Pupil Accounting II (3 hours)
- Introduction to Pupil Auditing (3 hours)
- Introduction to State Agency Resources (1 hour)
- Overview of State Reporting (3 hours)
- Principles of Education (3 hours)\*
- Pupil Accounting Legal Issues (2 hours)
- Pupil Accounting Legislative Primer (3 hours)
- Pupil Accounting Specialists in Action (3 hours)
- Team Leadership (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken outside of this certification track.

\*Offered every year at MSBO Annual Conference.

Total class time is 50 hours. Continuing Education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## School Payroll Specialist (SPS)

**Includes:** Payroll and Record Keeping. School Payroll Specialists are people employed primarily in payroll. A school payroll specialist typically reports to the chief financial officer or business office manager of a school district.

**Degree required:** Associate or equivalent

**Required class hours:** 43

**Required accounting hours:**  
4 semester hours

**Grandparent provision:** Yes

**Continuing education requirement:**  
90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

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## School Payroll Specialist Courses:

- Accounting Manual and Chart of Accounts (3 hours)
- Collective Bargaining Agreement, Contracts (3 hours)
- Introduction to School Business (14 hours)
- Principles of Education (3 hours)\*
- Record Keeping, Retention, Automation (3 hours)
- TDP, IRS Sec. 125, 403 (b), 457, and Workers Compensation (6 hours)
- Year-End Payroll & Tax Returns (941), W-2's, etc. (6 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (3 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered each year at the MSBO Annual Conference.*

Total class time is 43 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Specialist in Educational Data (SED)

**Includes:** Data Extraction and Data Reporting

**Degree required:** None

**Required class hours:** 50

**Grandparent provision:** Yes

**Continuing education requirement:** 90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

Many classes offered in partnership with Michigan Pupil Accounting and Attendance Association (MPAAA), [www.mpaaa.org](http://www.mpaaa.org)

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## Specialist in Educational Data Courses:

- Data Mining (3 hours)
- Data Quality I (3 hours)
- Data Quality II (3 hours)
- Educational Data and Its Uses (3 hours)
- Effective Communications (3 hours)\*
- Introduction to CEPI (3 hours)
- Introduction to Pupil Accounting I (3 hours)
- Organizational Applications (3 hours) (formerly Student Services Software Applications in Education)
- Principles of Education (3 hours)\*
- Pupil Accounting Legislative Primer (3 hours)
- State Reporting 101 (6 hours)
- Team Leadership (3 hours)
- Technology Policies (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (6 hours): Any course taken that is not required in this track, but is required in another.

\*Offered each year at the MSBO Annual Conference.

Total class time is 50 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.

# Certification Track Requirements

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## Transportation Director (CTD)

**Includes:** Transporting Students

**Degree required:** None

**Required class hours:** 66

**Grandparent provision:** Yes

**Continuing education requirement:**  
90 hours over five years

**Continuing education hours required can be met via:** college classes, workshops, conferences and professional development at the school district level.

Many classes offered by Michigan Association for Pupil Transportation (MAPT), [www.mapt.org](http://www.mapt.org).

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## Transportation Director Courses:

- Accident Investigation Procedures (3 hours)
- Basic Transportation Issues (18 hours)
- Effective Communications (3 hours)\*
- Human Resource for Transportation (6 hours)
- Labor Relations/Employment Law (6 hours)
- Laws, Rules and Regulations (4 hours)
- Liability & Tort Law (3 hours)
- Managing Staff Training (3 hours)
- Principles of Education (3 hours)\*
- Special Needs Transportation (3 hours)
- Transportation Facility Operations (6 hours)
- Writing Bus Specifications (3 hours)
- Wrap-up/Ethics (2 hours)\*
- Elective (3 hours): Any course taken that is not required in this track, but is required in another.

*\*Offered every year at the MSBO Annual Conference.*

Total class time is 66 hours. These hours must be completed in a three-calendar-year period. Continuing education hours are 90 hours within a five-calendar-year period.



## **SAVE THE DATES!**

### **Future MSBO Annual Conferences:**

**April 17 – 19, 2018 • Detroit**

**April 30 – May 2, 2019 • Grand Rapids**

**April 21 – 23, 2020 • Grand Rapids**

# Lodging Information

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Identify yourself as being with MSBO for special rates. Special rates for MSBO events expire 30 days prior to the event, except where a specific date is noted.

Amway Grand Plaza Hotel, Grand Rapids, 800.253.3590

Country Inn & Suites, Lansing, 517.827.7000 or Holiday Inn Express, Lansing, 517.646.7000  
(Good for events at MSBO office and Lansing Community College — West Campus)

Crystal Mountain, Thompsonville, 888.968.7686

DoubleTree by Hilton, Bay City, 989.891.6000

Evergreen Resort, Cadillac, 800.634.7302

Kellogg Center, East Lansing, 800.875.5090

Treetops Resort, Gaylord, 855.261.8764