



# 2016-17 CLASS SCHEDULE

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# MSBO Certification Program

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**M**SB O 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
- Child Nutrition Director
- Facilities Director
- Human Resource Specialist
- Operations Director
- Pupil Accounting Auditor
- Pupil Accounting Specialist
- School Payroll Specialist
- School Technology Management
- 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.



## Do I qualify?

Requirements vary for each of the 14 certification tracks. Each program will be offered by MSBO, through the Michigan Institute for Educational Management (MIEM), 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 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**  
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# MSBO Certification Track Requirements

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Certification courses are offered through MSBO and the Michigan Institute for Educational Management (MIEM) 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.



# 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. Group Solutions and the MSBO Leadership Institute are offered through MSBO, [www.msbo.org](http://www.msbo.org).



# 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.

# 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.

# 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. Group Solutions and the MSBO Leadership Institute are offered by MSBO, [www.msbo.org](http://www.msbo.org).

# 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.

# 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.

# 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.

# 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.

# 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.



# 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.

# 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.

# School Technology Management (STM)

**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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## School Technology Management 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.

# Specialist in Educational Data (SED)

*formerly Educational Data Specialist (EDS)*

**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.

# 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.

# MSBO Certification Class Offerings

September 21 – 22, 2016

**Kellogg Center • East Lansing**

## **Introduction to School Business**

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).

Registration form will be mailed separately; contact Nancy Jungkans, MSBO, at 517.327.5920 or register online at: [www.msbo.org](http://www.msbo.org). Recommended as one of the first certification class to attend to begin the MSBO Voluntary Certification Program.

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



## October 2 – 4, 2016

Crystal Mountain Resort, Thompsonville

### 18th Annual Facilities/Operations Director Conference & Expo

Required classes available to you:

- Budgeting for Facilities
- Computerized Facility Management
- Custodial Operations
- Facilities Planning, Design and Construction
- Maintenance Operations

More than 30 sessions will be offered.

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## October 24, 2016

MELG Building, Lansing

### Educational Data and Its Uses/Days and Hours

#### Educational Data and Its Uses

8:45 am – noon

Cost: \$90 member/\$120 nonmember

See first-hand how state reporting data is used from a variety of instructional and non-instructional perspectives. Included will be a review of the MI School Data website.

*R = Specialist in Educational Data E = for all others*

#### Days and Hours

12:45 pm – 4:00 pm

Cost: \$90 member/\$120 nonmember

What counts? How do you handle passing time? How do you calculate hours? This session is both nuts and bolts of the basics of Days and Hours and includes an opportunity for auditors and district staff to hear how “the other half lives”. An overview of current requirements as they relate to the school district calendars is also included.

*R = Pupil Accounting Auditor and Pupil Accounting Specialist E = for all others*



## October 26, 2016

MELG Building, Lansing

### Overview of Human Resource Management

*Presenters: Alex Gardner and Todd Surline, Hiring Solutions LLC*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

This session provides an overview of the hiring process, from recruiting, interviewing, and reference checks to staff orientation and record keeping. This session takes you through the steps of setting up personnel records, handling FOIA requests, address policies and procedures by exploring employee handbooks and understanding how worker's compensation records should be kept in the personnel file.

*R = Human Resource Specialist E = for all others*

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## October 27, 2016

MELG Building, Lansing

### Developing and Managing RFPs

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

An in depth review of the Request for Proposals (RFP) process including the development of the RFP through the evaluation of proposals and the award of the contract. Subjects covered include when to use a Request for Proposal versus an Invitation for Bid (IFB), writing specifications, managing the process, selection of an evaluation team, roles and responsibilities of the teams, evaluating and rating the proposals and pricing, conducting interviews/ demonstrations, negotiating with bidders, finalizing the subsequent agreement and administering the contract.

*R=Certified Purchasing Officer E=all others*





November 9, 2016

MELG Building, Lansing

**Vision, Strategic Planning, and Implementation**

*Presenters: David Palme, Ingham ISD and Jeff Trudell, Wyandotte Public Schools*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

Learn the planning process for technology, including creating a technology plan, integrating school improvement and district improvement plans, forecasting future needs, and implementing new systems. Technology planning, and tips and methods for evaluation of new and existing technology will be reviewed. The emerging use of distance learning technologies and other professional development opportunities for staff will be addressed. An overview of project management including the Michigan laws, bidding requirements, electrical and construction codes, plan review requirements, and practical implications of working with contractors on technology integration projects and processes will be shared.

*R=School Technology Management E=all others*

**CANCELLED**

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November 10, 2016

MELG Building, Lansing

**TDP, IRS, Sec. 125, 403(b), 457 Plans, and Worker’s Compensation**

*Presenter: Plante Moran*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

Understand the processing of workers’ compensation claims and the legal and operational aspects of a deferred/defined contribution program and how it affects every payroll office in the state. Know the rules and regulations of 403(b) and cafeteria plans (Sec. 125).

*R=Human Resources Specialist and School Payroll Specialist E=all others*



**November 16, 2016**

**Lansing Community College West Campus, Lansing**

**Collective Bargaining Agreement, Contracts/Instructional Program Evaluation**

**Collective Bargaining Agreement, Contracts**

*Presenters: Ray Davis, Thrun Law Firm and Karla Colestock, Portage Public Schools*

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Learn how to interpret bargaining agreement language, understand leave benefits, grievance procedures, as well as an overview of union dues and political deductions and non-deductions. Learn how to administer overtime, FMLA, and FLSA. Also gain knowledge of the difference between an independent contractor vs. an employee.

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

**Instructional Program Evaluation**

*Presenters: Ross C. Groover, Joshua Tynan, and Thomas Wall, Dearborn Public Schools*

**12:45 pm – 4:00 pm**

**Cost: \$90 member/\$120 nonmember**

Understand the components of instructional programs; learn how to develop procedures for evaluating and reporting cost – effectiveness; analyze economics; use evaluation data; and allocate resources to improve instructional programs.

*R=Chief Financial Officer E=all others*



# November 29, 2016

Kellogg Center, East Lansing

## Bonding/Borrowing/Investing and Cash Management

### Bonding/Borrowing/Investing

*Presenters: Bob Regan and Brenda Voutyras, Stifel, Nicolaus & Company, Incorporated, Jeff Soles, Thrun Law Firm, Paul Stauder, PFM*

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

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*

### Cash Management

*Presenters: Michelle McHale, Plante Moran, Brian Quinn, MILAF+/PFM Asset Management, and Mary Beth Rogers, Clarkston Community Schools*

**12:45 pm – 4:00 pm**

**Cost: \$90 member/\$120 nonmember**

Learn to develop specifications for the selection of banking and other financial services, apply the concept of compensating balances, comprehend procedures and legal constraints for cash collection and disbursement, analyze monthly internal transfers and loans, prepare a cash flow analysis, including a fund balance report for your board. Understand how to identify and deal with fraud and abuse.

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

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# December 1, 2016

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

## Payroll and Related Personnel Issues

*Presenters: Kim Bruske and Chris Frank, Saginaw ISD and Kristi Krafft-Bellsky, Yeo & Yeo, P.C.*

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Understand the laws and regulations related to 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=Business Office Manager and Chief Financial Officer E=all others*

# December 6, 2016

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

## **Purchasing Overview**

*Presenters: Sandra Elka, Huron Valley Schools and Jeremy Motz, Clark Hill, PC*

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

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

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# December 8, 2016

**MELG Building, Lansing**

## **Emergency Preparedness Management/Managing Emergencies**

### **Emergency Preparedness Management**

*Presenter: Tom Mynesberge, Critical Incident Management*

**8:45 am - noon**

**Cost: \$90 member/\$120 nonmember**

Identify, develop, and learn how to execute a plan for emergency management.

*R=Facilities Director E= for all others*

### **Managing Emergencies**

*Presenter: Tom Mynesberge, Critical Incident Management*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

Identify, develop and implement emergency planning. From natural disasters to bus accidents you need to have plans in place. You will learn what to look for and what information to gather along with coordinating with emergency responders, school personnel, and the community.

*R=Operations Director E= for all others*



**December 13, 2016**

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

**Accident Investigation Procedures**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

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 11, 2017**

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

**Overview of State Reporting**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Developed in close coordination with CEPI, Michigan Department of Education (MDE) and the Bureau of Assessment & Accountability (BAA), participants will look at state reporting requirements and resources from the birds-eye view. Participants will review important connections and deadlines related to Michigan School Data System (MSDS).

*R= Pupil Accounting Specialist E=all others*



## January 12, 2017

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

### **Record Keeping Retention/Automation**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Participants will be provided an overview of 1) Requirements for payroll/personnel records, automated file maintenance, and related retention procedures. 2) Privacy issues related to payroll and the rules in accessing personnel records. 3) Different systems in place that track students including SRSD, MEIS, REP and special education and 4) The importance of each system and how these systems are used within the school district. Also covered is an overview on FOIA, COBRA, and criminal record checks.

*R=School Payroll Specialist E=all others*

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## January 24, 2017

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

### **Security Disaster/Recovery**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

An overview of security best practices at the network, server and workstation levels will be discussed. The security practices covered can be applied to multiple types of network architectures including Windows, Linux and others. Also covers best practices on creating and implementing a disaster recovery plan.

*R=School Technology Management E=all others*

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## January 25, 2017

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

### **Time Management**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Become a more effective manager by budgeting your time, identifying and assigning priorities, and establishing and achieving daily goals.

*R= Operations Director and School Technology Management E=all others*



February 9, 2017

MELG Building, Lansing

## Introduction to Facilities Management/Introduction to Operations Management

*Presenters: Matt and Karen Losch, Excel Consultant Group, LLC*

This session is an overview of educational facilities operation with a focus on several key areas. This class discusses the role of the Facilities Manager in the educational community and the impact of facilities in general on the learning and work environment. An outline of the legal and regulatory responsibilities will also be discussed.

After lunch the session will continue into Operations Management which includes the role of the Transportation Director in the educational community and the impact of these combined duties in general in the learning and work environment. Any legal and regulatory responsibilities with Transportation will also be discussed.

### Introduction to Facilities Management

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

This session is a three hours of an overview of educational facilities operation with a focus on several key areas. This class discusses the role of the Facilities Manager in the educational community and the impact of facilities in general on the learning and work environment. An outline of the legal and regulatory responsibilities will also be discussed. After lunch the session will continue into Operations Management which includes the role of the Transportation Director in the educational community and the impact of these combined duties in general in the learning and work environment. Any legal and regulatory responsibilities with Transportation will also be discussed.

*R= Facilities Director E = all others*

### Introduction to Operations Management

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

An overview of educational operations with a focus on several key areas. This class discusses the role of the Facilities Manager and the Transportation Director in the educational community and the impact of these combined duties in general in the learning and work environment. An outline of the legal and regulatory responsibilities will also be discussed.

*R= Operations Director E = all others*



## February 14, 2017

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

### **Accounting Manual and Chart of Accounts**

*Presenters: Christopher May, Michigan Department of Education and Glenda Rader, Grand Ledge Public Schools*

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

What every school payroll/personnel should know about State Bulletin 1022 Accounting Manual and its relationship to their position in the school district. Learn how to account for payroll division of state and federal programs and compensated absences and averages. Find out how to monitor the budget.

*R=School Payroll Specialist E=all others*

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## February 16, 2017

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

### **Principles of Contract Writing**

**8:45 am – noon**

**Cost: \$90 member/\$120 nonmember**

Learn tips and techniques to write and interpret contracts more effectively. This session will define what a contract is, the components and structure of a contract and will cover various provisions that should be included.

*R=Certified Purchasing Officer E=all others*





## February 22, 2017

**MELG Building, Lansing**

### **Technology in Education**

*Presenter: Mark Deschaine, Grand Ledge Public Schools*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

A basic overview of technology in schools. It is recommended as one of the first classes in the program. It covers the following topics: Makeup of the technology team, managing technology in the classroom, training, working with consultants and vendors, business office technology, cost of ownership and outsourcing your technology services.

*R=School Technology Management E=all others*

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## March 7, 2017

**Kellogg Center, East Lansing**

### **Team Leadership (choose your time)**

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

**8:45 am – noon or 12:45 pm – 4:00 pm**

**Cost: \$90 member/\$120 nonmember**

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 except School Payroll Specialist and Transportation Director*



**March 14, 2017**

**Michigan High School Athletic Association, East Lansing**

**State Reporting 101**

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

Developed in close coordination with the Center for Educational Performance and Information (CEPI), the Michigan Department of Education (MDE) and the Bureau of Instructional Support and Student Assessment, this workshop will cover reporting and use of student and school data. You will learn how the data are connected and the importance of data quality. Participants will learn details of student data reporting through the Michigan Student Data System (MSDS) and how data are used by many different offices within MDE and other State agencies. Special attention will be given to high-stakes data, such as those impacting funding (membership/FTE), that determine subgroups, identify special program participation, or for monitoring compliance. We'll also discuss the most common areas where errors occur and give you some tools to help navigate through of the more complex situations.

The workshop will also touch on data reported through other CEPI applications: Registry of Education Personnel (REP), the Financial Information Database (FID), the School Infrastructure Database (SID) and the functions provided in the Educational Entity Master (EEM), and the Graduation and Dropout application (GAD). We'll also briefly discuss how MDE's applications are connected to and through CEPI's Longitudinal Data System (LDS).

*R= Specialist in Educational Data*

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**March 21, 2017**

**Lansing Community College West Campus, Lansing**

**Labor Relations/Employment Law**

*Presenter: Thrun Law Firm, P.C.*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

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

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



## March 22, 2017

**MELG Building, Lansing**

### **Purchasing Advanced**

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

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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## March 30, 2017

**MELG Building, Lansing**

### **Accounting for the Non-Accountant**

*Presenter: Kathy Konon, Walsh College and practitioner*

**8:45 am – 4:00 pm**

**Cost: \$160 member/\$220 nonmember**

Savvy business officials will help you prepare a budget and teach you the accounting terminology to help you work more efficiently with your business office. Who should attend: board members, administrators, accounting specialists, and business office staff who are not directly involved with or are new to the financial reporting of a school district. There will be discussion on preparing a cash flow analysis, including a fund balance report for the board of education, and indications of fraud and abuse in the accounting reporting.

*E=all tracks*



# Information

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## **Overnight Accommodations:**

For overnight accommodations at the Kellogg Center, East Lansing, call 800.875.5090. Identify yourself with MSBO/MIEM for a special rate.

For all programs being held at MELG Building or Lansing Community College West, overnight accommodations can be made at Country Inn & Suites at 517.827.7000. Identify yourself with MSBO/MIEM for a special rate.

## **State Continuing Education Clock Hours (SCECHs):**

SCECHs may be granted to each participant pending approval. To receive the SCECHs, you must be on time and stay until the end of the program. You must provide a valid e-mail and Personal Identification Code (PIC) that matches within the Michigan Online Educator Certification System (MOECS).

## **Payment Policy:**

Payment must be made by the day of the event or a \$25 late fee is assessed. All unpaid balances will be issued an invoice after the event which will include the \$25 late fee. A submitted registration form is a commitment to pay. NOTE: Purchase orders are not payment. All no shows will be invoiced.

## **Cancellation Policy:**

A \$25 service fee will be retained for all cancellations. No refunds will be issued for cancellations made two weeks prior to the event. Substitutions may be allowed until the start time of the program without penalty, by emailing MIEM at [miem@gomiem.org](mailto:miem@gomiem.org).

## **Weather Policy:**

Because we book our programs almost a year in advance, it is very difficult to cancel without costs involved. In event of bad weather, please check the [www.gomiem.org](http://www.gomiem.org) website for scheduling delays and program updates.



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