



## AASBO Local School Financial Management Certificate Program

Core Curriculum

(All 36 hours required to complete certificate)

(The **BOLDED** and underlined courses will be offered in the **November 2022 program**)

1. Principles of Accounting I (6-hour course)
2. **Principles of Accounting II (6-hour course)**
3. Knowing Your School/School District and Understanding Your Role in School Administration
4. Elements of Local School Accounting I
5. **Elements of Local School Accounting II**
6. **Effective Communication/Working With People**
7. School Law
8. Personnel Management
9. Budget and Financial Reporting
10. Utilizing Technology in Local School Financial Management

### Local School Financial Management Program

#### PURPOSE:

To assist in the development of professional knowledge, understanding and competency to enable local school financial personnel to contribute effectively to key areas of school administration.



## Local School Financial Management Virtual Program November 21-December 2, 2022

### Core Courses:

- **Elements of Local School Accounting II**  
*LSFM Core Course and Continuing Education*

This session will focus on how the district's policies, procedures and regulations relate to their job function. The course will provide an in-depth discussion of proper accounting procedures related to cash receipts/disbursements, fundraisers, outside organizations and other financial transactions. Participants will gain an understanding of the proper procedures and guidelines for payroll to include federal, state, and local regulations.

**Speakers:** Karen Lusk-Smith - AASBO  
Linda McGhee - AASBO  
Jan Swiderski – Auburn City Schools

- **Principles of Accounting II, Part I**  
*LSFM Core Course and Continuing Education*

This course is designed as an introduction to accounting concepts and principles. This course will provide a solid foundation of accounting knowledge that is critical for local school financial personnel. After completion of this course, participants should have an understanding of the basic accounting assumptions, principles, and terminology used within the general accounting functions.

**Speaker:** Christopher White, Assistant Vice Chancellor and Controller for AUM

- **Principles of Accounting II, Part II**

***LSFM Core Course and Continuing Education***

This course is designed as an introduction to accounting concepts and principles. This course will provide a solid foundation of accounting knowledge that is critical for local school financial personnel. After completion of this course, participants should have an understanding of the basic accounting assumptions, principles, and terminology used within the general accounting functions.

**Speaker: Christopher White- Assistant Vice Chancellor and Controller for AUM**

- **Effective Communication/Working with People**

***LSFM Core Course and Continuing Education***

The course will present the importance of building positive working relationships with others and effective communication in the workplace. Discussion will focus on proposed techniques for handling difficult situations and minimizing staff resistance and stress. Session will also discuss the impact that their conduct, attitude, and professionalism have on the image of their school.

**Speaker: Dr. Hannah George, The University of Alabama**

## Continuing Education Courses

- **Current Issues for Local Schools**

***LSFM Elective Course and Continuing Education***

This session will provide information on some of the current issues and topics in local school accounting. Topics in this session will include accounting procedures for fixed assets and supplemental inventory, compliance with state and federal procurement requirements and an update on federal funding for local school programs.

**Speakers: Leslie Poe – Talladega City Schools  
Kelley Augsburger – Auburn City Schools  
Connie Wallace – Retired CSFO**

- **Best Practices in Local School Finance**

***LSFM Elective Course and Continuing Education***

This session will include processes and procedures that systems should be utilizing for a more productive and efficient workplace in the local school setting. It will include best practices for month end procedures, classroom instructional supply management and online payment options.

**Speakers:  
Melanie Maples – Retired CSFO  
Connie Wallace – Retired CSFO  
Michele McCay – Hoover City Schools**

- **NextGen – Local Schools**

***LSFM Elective Course and Continuing Education***

Understanding and knowing the ins and outs of the software can provide a more efficient and productive work environment. This session will discuss the software from the local school bookkeeper's perspective. The areas that will be covered will include accounts payable, bank reconciliations, allocation tracking, emailing purchase orders, and utilizing E-school payments. It will also allow time for a question-and-answer session.

**Speaker: Janet Cowart – Harris School Solutions**

### **CONTINUING PROFESSIONAL EDUCATION for CPA's**

Courses will be submitted for approval by the Alabama Board of Public Accountancy.

### **TRANSCRIPTS**

Please contact Anna Clay Adams at [acadams7@ua.edu](mailto:acadams7@ua.edu) to request a copy of your transcript.

### **FURTHER INFORMATION**

If you have questions or need more information, call Anna Clay Adams, AASBO Program Coordinator, The University of Alabama at (205)-348-6224. You may e-mail her at [acadams7@ua.edu](mailto:acadams7@ua.edu).

### **AASBO MEMBERSHIP DUES**

In order to attend this training session, you must be a member of AASBO. AASBO provides programs and services to promote the highest standards of school business practices through professional development, recognition, and the effective management of available resources. Joining AASBO gives you the means to improve both yourself and your organization. Your annual dues of \$50 (\$100 for CSFO) can be paid on this registration form. Membership cycles run from July 1, 2022-June 30, 2023.

### **BILLING POLICY**

Registrations for College of Continuing Studies programs should be accompanied by check or credit card payment. Registrations that are submitted without payment will be billed and collected through UA Student Receivables. To ensure proper documentation of payment, we strongly encourage all registrations be submitted with payment.



# Alabama Association of School Business Officials

November 21, 2022-  
December 2, 2022

## Registration Options

Register by Mail  
Registration Services  
The University of Alabama  
Box 870398  
Tuscaloosa, AL 35487

Register by Phone  
1-866-432-2015  
1-205-348-3000

Please submit this entire page for your registration. For multiple registrations, please duplicate this form.

First: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Last: \_\_\_\_\_

Preferred Name / Nickname: \_\_\_\_\_

School Name: \_\_\_\_\_

School System: \_\_\_\_\_

I work at a (Check One):  Elementary  Middle  High School  Central Office

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Job Title: \_\_\_\_\_

How did you find out about this program? \_\_\_\_\_

School issued purchase order # \_\_\_\_\_ (Must include hard copy.)

Enclosed is a check for \$ \_\_\_\_\_ made payable to THE UNIVERSITY OF ALABAMA

Charge \$ \_\_\_\_\_ to credit card:  MasterCard  VISA  American Express  Discover

Card # \_\_\_\_\_ Exp. Date / \_\_\_\_\_

Security / Verification / CVV Code \_\_\_\_\_ (Three or four digit code on back or front of credit card.)

Need our STAARS Vendor Number? Please use VC000118827 for UA College of Continuing Studies. The University of Alabama is committed to complying with the Americans with Disabilities Act. Requests for accommodation of physical and/or dietary needs should be made at least 30 calendar days in advance of the program date. Please email your request to [abergeron@ccs.ua.edu](mailto:abergeron@ccs.ua.edu). A portion of the invoice amount for this program will go to the Capstone Lifelong Learning Foundation to support activities of The University of Alabama and the College of Continuing Studies.

AASBO Membership Dues  
Program #CS-2207-AASBODUES23-01

AASBO Membership is required to attend this training session.

\$50 Active Members  
 \$100 CSFO

Local School Financial Management Certificate Program and Continuing Education  
Program # CS-2211-LSFMV-01

\$150 Registration Fee

Select from the following. I am:  
 AASBO Certificate Program Graduate  
 Payroll/Personnel Certificate Program Graduate  
 Local School Financial Management Graduate  
 NOT a graduate of these programs

Please enroll me in the following:

Local School Financial Management (Virtual)  
(Your virtual registration will grant access to all courses)

aasbo.com