



## AASBO Local School Financial Management Certificate Program

Core Curriculum

(All 36 hours required)

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 Certificate Program March 2022**

**Monday, March 7, 2022**

**9:00am - 12:30pm (Choose One)**

### **Knowing Your School/School District and Understanding Your Role Within School Administration**

Core Course for LFSM Certificate

The course is designed to give participants an overview of their school/school district in terms of its purpose, objectives, structure culture and systems. Participants will gain an understanding of how following policies and procedures make the school a more effective and efficient organization.

Presenters: **Connie Wallace, Retired CSFO**  
**Linda McGhee, AASBO**  
**Sonja Peaspanen, Alabama State Department of Education**

### **How to Work with Principals on School Related Matters**

Continuing Education Course for LFSM Certificate Graduates

This course will look at the importance of working well with your principal concerning local school funds through the eyes of the local school supervisor, the CSFO and the Principal of a school.

Presenters: **Gena Groce, Madison County Schools**  
**Karen O'Bannon, Madison County Schools**  
**Daniel L. Evans, Jr., Madison County Principal**



**1:00pm - 4:30pm (Choose One)**

### **Principles of Accounting I (Part 1)**

Core Course for LSFM Certificate

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 function.

Presenter: **Christopher White, AVC & Controller, Auburn University Montgomery**

### **GL Coding and Financial Reporting**

Continuing Education Course for LSFM Certificate Graduates

This session will look at the importance of proper GL coding as how that relates to correct financial reporting. Topics will include month-end procedures, verifications, edit checks and CIS funds.

Presenters: **Lynn Buch, Homewood City Schools**  
**Gena Groce, Madison County Schools**  
**Tanya Holcomb, Pell City Schools**



**Tuesday, March 8, 2022**

**9:00am - 12:30pm (Choose One)**

**Principles of Accounting I (Part 2)**

Core Course for LSFM Certificate

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 function.

Presenter: **Christopher White, AVC & Controller, Auburn University Montgomery**

**Nextgen Software Day to Day Activities**

Continuing Education Course for LSFM Certificate Graduates

This session will include guidance on the Harris software side of day-to-day activities. Topics will include PO setup, vendor files, attaching documents, allocation tracking, reports, and queries.

Presenter: **Janet Cowart, Harris Solutions**



**1:00pm - 4:30pm**

**Elements of Local School Accounting I**

Core Course for LSFM Certificate

This session will provide an in-depth review of the purpose and use of the financial reports of the school/school district. Participants will gain an understanding of the standardized accounting structure for school districts, as well as the classification of school funds at the local school level and their proper uses and required reporting. Basic concepts of student activity fund accounting will be reviewed and effective management practices that make day-to-day financial operations more efficient will be discussed.

Presenters: **Connie Wallace, Retired CSFO**

**Sonja Peaspanen, Alabama State Department of Education**

**Lisa Guzman, Florence City Schools**

**Lynn Buch, Homewood City Schools**

The AASBO Certificate Programs for the Alabama Association of School Business Officials is supported by the State of Alabama Department of Education, Division of Administrative and Financial Services.

### **NOTICE TO PROGRAM GRADUATES**

AASBO Professional Certificate Program Graduates—all courses will count toward your Professional Certification maintenance requirement of 18 Continuing Professional Education hours per year (October through September).

Payroll Personnel Certificate Program Graduates—all courses will count toward your Professional Certification maintenance requirement of 12 Continuing Professional Education hours per year (October through September).

Purchasing Procurement Certificate Program Graduates—all courses will count toward your Professional Certification maintenance requirement of 9 Continuing Professional Education hours per year (October through September).

Local School Financial Management Certificate Program Graduates—all courses will count toward your Professional Certification maintenance requirement of 9 Continuing Professional Education hours per year (October through September).

### **REGISTRATION FEES**

**Registration fee is \$150.**

### **LOCATION AND LODGING**

All courses will be held in the Paul W. Bryant Conference Center, a premier learning facility located at 240 Paul Bryant Drive on The University of Alabama campus in Tuscaloosa.

Lodging is the responsibility of each participant. Rooms may be reserved at Hotel Capstone (adjacent to the Bryant Center) by calling (205) 752-3200. Please identify yourself a part of the CCS-AASBO group to receive the discounted rate.

**BLOCK NAME:** [CCS-AASBO March 2022 Room Block](#)

**BLOCK DATES:** [March 6-8, 2022](#)

## LAST DAY TO BOOK IN BLOCK: February 16, 2022

Rate: \$129

<https://gc.synxis.com/rez.aspx?Hotel=21565&Chain=8579&arrive=3/6/2022&depart=3/8/2022&adult=1&child=0&group=220306AASBO>

How to use the link --

- Hold down control and click on the link above to open up the webpage
- Choose your date of arrival by clicking on “check-in” and departure in “check-out”; select “search”
- Select the room type you prefer by clicking on “Show Rooms” and it will drop down your available options
- Select “Book Now” for the room that fits your needs
- Complete your reservation by entering all requested information and click “Continue”; you will receive their confirmation number upon completion.
  - NOTE -- Only the dates above and room types contracted are available at the contracted rate -- rooms requested outside of your block dates or different room types are based on availability and at the prevailing rate.
- Or use code **220306AASBO** on [www.hotelcapstone.com](http://www.hotelcapstone.com)

Prefer to book by phone:

- Rooms in the block can be booked by calling 205-752-3200. Ask for the block with the corresponding dates.
- The Agent will ask for an email address, so that we may email your confirmation letter; They will also be able to provide the confirmation number for you over the phone.
- Be prepared with your payment method as it will be required to make a reservation over the phone.

## PARKING

Approximately three days before the AASBO program, you will receive an email confirmation with your parking permit attached for the Capstone Parking Deck. Guests will need to enter your parking pass code when you **enter** and **exit** the parking deck. If you have any problems, there is a call button near the speaker on the far right of the red access column and the call will go directly to Parking Services so they can access the gate. If you do not receive the parking email by March 4, 2022 please contact Registration Services at 205-348-3000.

If you are staying at Hotel Capstone and parked in their parking lot, there is no need to display the parking decal you receive from The University of Alabama.

## **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 [AASBO@ua.edu](mailto:AASBO@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 [AASBO@ua.edu](mailto:AASBO@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, 2021-June 30, 2022.

## **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.





## Registration Options

Register by Mail	Register by Phone
Registration Services	1-866-432-2015
The University of Alabama	1-205-348-3000
Box 870398	
Tuscaloosa, AL 35487	

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. 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.

## March 7-8, 2022

### AASBO Membership Dues

Program #CS-2107-AASBODUES21-01

*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-2203-LSFM01-01  
March 7-8, 2022 • Bryant Conference Center  
240 Paul W. Bryant Drive, Tuscaloosa, AL 35401

- \$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:

#### March 7, 2022, 9 a.m.-12:30 p.m. (Choose one)

- 1. Knowing Your School/School District and Understanding Your Role within School Administration (CORE COURSE)
- 2. How to Work with Principals on School Related Matters (CONTINUING EDUCATION COURSE)

#### March 7, 2022 1:00-4:30 p.m. (Choose one)

- 3. Principles of Accounting I, part 1 (CORE COURSE)
- 4. GL Coding and Financial Reporting (CONTINUING EDUCATION COURSE)

#### March 8, 2022 9 a.m.-12:30 p.m. (Choose one)

- 5. Principles of Accounting I, part 2 (CORE COURSE)
- 6. Nextgen Software Day to Day Activities (CONTINUING EDUCATION COURSE)

#### March 8, 2022, 1:30-5 p.m. (Choose one)

- 7. Elements of Local School Accounting I (CORE COURSE)