



## 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 and  
Continuing Education Program**

**Virtual Program**

**March 14-31, 2022**

Welcome to the AASBO Local School Financial Management certificate program. The courses for the Local School Management certificate program and continuing education courses will be available from March 14-31, 2022 in Event Owl. Login information will be sent by March 11, 2022. This program will offer 4 courses (12 hours) of continuing education requirements. All sessions are pre-recorded so you can take the courses as your schedule allows. Participants will be able to take any or all courses and do not have to register for individual courses. All courses have several speakers and topics, so you do not have to sit through the entire course in one sitting. However, participants are required to take all parts of each course in order to receive credit for the three-hour course.

There is a Conference Information & FAQ section on the agenda under Quick View (in Event Owl) that will assist you in navigating the Event Owl platform. We highly recommend that you watch the informational video as it contains important information regarding how the program works. If you have additional questions, please contact Anna Clay Adams at [aasbo@ua.edu](mailto:aasbo@ua.edu).

## **Local School Financial Management Certificate Courses**

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

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

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**

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

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

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**

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

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

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**

### **Elements of Local School Accounting I**

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

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**

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

#### Continuing Education Course

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**

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

#### Continuing Education Course

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**

### **Nextgen Software Day to Day Activities**

#### Continuing Education Course

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**

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.

### **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  
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. 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 14-31, 2022

## VIRTUAL PROGRAM

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-LSFMV1-01  
March 14-31 2022 • Virtual Program

\$150 Registration Fee

Available Courses:

Knowing Your School/School District and Understanding Your Role within School Administration (CORE COURSE)

How to Work with Principals on School Related Matters (CONTINUING EDUCATION COURSE)

Principles of Accounting I, part 1 (CORE COURSE)

GL Coding and Financial Reporting (CONTINUING EDUCATION COURSE)

Principles of Accounting I, part 2 (CORE COURSE)

Nextgen Software Day to Day Activities (CONTINUING EDUCATION COURSE)

Elements of Local School Accounting I (CORE COURSE)