

Section III: Certification Program Curriculum

A. Accounting and Finance Curriculum

ACT 100: Fundamentals of Bookkeeping

- A. Accounting formulae and double entry bookkeeping
- B. General and special journals
- C. General, detailed, and subsidiary ledgers
- D. Trial balances and worksheets
- E. Adjusting entries, reporting and closing the books
- F. Test

ACT101A: State Aid Calculation Part I

- A. The history of state aid to schools in Texas
- B. Equalization concept and Tier I and Tier II
- C. Review of elements of aid calculation
- D. Test

ACT 101B: State Aid Calculation Part II

(ACT101A is a prerequisite for this course)

- A. Budget problems
- B. Payment and property tax issues
- C. Practice problem
- D. Test

ACT 102: Introduction to Financial Accounting & Reporting Module

THIS COURSE IS NO LONGER OFFERED

ACT 103: The Elements of School District Accounting

THIS COURSE IS NO LONGER OFFERED

ACT 104: Budget and Financial Planning

- A. Budgetary approaches
- B. The budget development process
- C. Communicating the budget
- D. Roles and responsibilities
- E. Legal requirements (funds to be budgeted)
- F. Forecasting
- G. Multiyear projections
- H. Fund balance
- I. Grant/construction programs
- J. Truth in taxation
- K. Fiscal year change
- L. Test

ACT 105A: Basic Governmental Accounting Part I

(Suggested course for those without accounting background)

(Hand calculator required for class.)

- A. Define governmental accounting
- B. Principles of debits and credits
- C. How to record bookkeeping entries
- D. Purpose of the general ledger
- E. Preparing financial statements
- F. Understanding the balance sheet
- G. Closing a set of books
- H. Review the accounting cycle
- I. Budgeting process
- J. Explanation of budgetary accounts
- K. Understanding the encumbrance system
- L. Analyzing budgetary variances
- M. Test

ACT 105B: Basic Governmental Accounting Part II

(Hand calculator required for class.)

- A. Facts about the Governmental Accounting Standards Board (GASB)
- B. General fund
- C. Special revenue fund
- D. Capital projects fund
- E. Debt service fund
- F. Permanent funds
- G. Proprietary fund
- H. Fiduciary fund
- I. Long-term liability accounts and general capital asset accounts
- J. Internal controls
- K. Test

ACT 106: Financial Coding for Texas Schools

- A. Overview of account codes
- B. Fund codes
- C. Function code series 10-90
- D. Expenditure/expense object codes
- E. Optional codes 1 and 2
- F. Organization codes and types of organizational units
- G. Fiscal year codes
- H. Program intent codes
- I. Optional code 3 - educational span
- J. Optional codes 4 and 5
- K. Revenue object codes
- L. Other resources/non-operating revenue object codes
- M. Other uses/non-operating expense object codes
- N. Asset object codes
- O. Liability object codes

- P. Fund balance/net assets codes
- Q. Clearing account object codes
- R. GASB 34 coding changes
- S. Test

ACT 107: Pupil Projections

- A. The need for projecting end of year student counts
- B. The fundamentals of student attendance accounting
- C. Three projection types
 - 1. Projection of ADA and FTE from enrollment
 - 2. Ratio projection
 - 3. Trend
 - 4. Cohort survival
- D. Special Cases
 - 1. Small numbers of students
 - 2. Volatile conditions
- E. Class problem
- F. Evaluation of projection
- G. Practice problem
- H. Test

ACT 108: Accounts Payable Processes

- A. The role A/P plays in the district's financial position.
- B. The relationship between accounts payable department and purchasing department.
- C. Knowledge of internal control components
- D. Knowledge and understanding of internal controls
- E. Test

ACT 111: Advanced Issues in State Funding

THIS COURSE IS NO LONGER OFFERED

ACT 201: Internal Auditing

- A. Need for internal audit function
 - 1. Internal audit definition
 - 2. Importance of internal auditing
- B. Selecting and developing an audit staff
 - 1. Professional standards
 - 2. Code of ethics
- C. Establishing an audit charter
- D. Developing an internal audit manual
- E. Developing an audit schedule
- F. Performance standards
- G. Test

ACT 202: External Auditing

- A. State guidelines
- B. External audits
- C. Pre-audit procedures
- D. Post-audit procedures
- E. Releasing the audit
- F. Management audits (non-financial audits)
- G. SAS112
- H. Test

ACT 203A: The Basics of Investing School Funds

- A. Investment terminology
- B. Federal Reserve System
- C. Reporting requirements
- D. Compliance with the Public Funds Investment Act
- E. Test

ACT 203B: Investing School Funds

- A. Review of types of investment risk
- B. Investment controls and strategies
- C. Depository contracts
- D. Reporting requirements
- E. Compliance with the Public Funds Investment Act
- F. Test

ACT 205A: Intermediate Governmental Accounting-Part I

(For those with an accounting background)

(Hand calculator required for class)

- A. Accounting principles-GASB
- B. Budgeting and budgetary accounting
- C. Governmental fund type transactions
- D. Trust and agency funds
- E. Enterprise and internal service funds
- F. Revenue and expenditure recognition
- G. Capital assets
- H. General long-term debt
- I. Test

ACT 205B: Intermediate Governmental Accounting-Part II

(For those with an accounting background)

(Hand calculator required for class)

- A. Financial reporting
 - 1. Interim financial reports
 - 2. Comprehensive annual financial reports
 - 3. Investments
- B. Analysis and interpretation of financial statements
- C. Auditing standards

- D. Application of governmental accounting principles by participants working problems in class
- E. Test

ACT 208: *Managing Special Revenue and State Programs*

- A. Accounting and reporting processes of managing special revenue funds, including types of special revenue funds
- B. Budgeting
- C. Expenditure reporting
- D. Indirect cost revenue
- E. Allowable expenditures
- F. PEIMS reporting
- G. Comparability issues
- H. Test

ACT 209: *District-wide Risk Assessment*

- A. An understanding of District-wide Risk Assessment
- B. Control structures and their use
- C. Defining risk and the different types of risk
- D. Defining controls the different types of controls
- E. Completing a risk and control matrix
- F. Understanding the difference between District-wide risk assessment and the Annual risk assessment performed by Internal Audit
- G. Test

ACT 210: *Operational Auditing*

- A. Definition of operational auditing
- B. Types of operational auditing
- C. Internal control emphasis
- D. Benefits to school districts
- E. Available resources
- F. Audit programs steps
- G. Reporting results
- H. Test

ACT 214: *Introduction to Bonds and Debt Planning*

- A. Demographic analysis of Texas
 - 1. Changing populations
 - 2. Student density
 - 3. Change in property values
 - 4. Operating tax capacity
 - 5. Student performance
 - 6. Construction
 - 7. Debt
- B. District demographic analysis
 - 1. Student enrollment

2. Property value history
3. Tax history
4. Debt history
- C. District facility information
 1. Campus
 2. Portables
 3. Maintenance schedules
 4. Land site history
 5. Other district facilities
- D. Bond project planning
 1. Project planning
 2. Facility needs
- E. Bond election strategies
- F. Selling school bonds
 1. Bond basics
 2. Types of bonds
 3. Bond ratings
 4. Financial advisor
 5. Underwriters
 6. Bond counsel
 7. General rules
 8. Primary and secondary markets
- G. Attorney General tests and approval
- H. Overview of debt structure, permanent school fund, bond insurance and bond portfolio management
- I. Test

ACT 301: Activity Fund Accounting

- A. Legal basis
- B. Sources of funds
- C. Management of funds
- D. Expenditure of funds
- E. Accounting provisions
- F. Centralized and decentralized accounting methods
- G. Internal controls
- H. Fundraising and use of funds
- I. Test

ACT 302: Service Efforts and Accomplishments Reporting

THIS COURSE IS NO LONGER OFFERED

ACT 303: Advanced Financial Concepts

- A. Cost reporting & analysis
 1. Demand for detail in financial reporting and analysis
 2. Concepts of program cost reporting & analysis
 3. Outsourcing & in sourcing
- B. Benchmarking

1. Benchmarking introduction
 2. Functional analysis
 3. Compensation analysis
 4. Staffing analysis
- C. Revenue analysis, human resources support and performance reporting
D. Test

ACT 305: Advanced Governmental Accounting

- A. The financial reporting entity
- B. Statement of cash flows
- C. Accounting for risk financing activities
- D. Arbitrage accounting
- E. Budgeting for compliance with state and federal requirements
- F. Using PEIMS edit checks
- G. Disclosing obligations to current and former employees
- H. Appropriate uses of fund equity classifications
- I. Continuing disclosures for debt under SEC Rule 15c2-12
- J. Comparison of effectiveness and efficiency
- K. Service efforts and accomplishments
- L. Texas School Performance Reviews
- M. Potential cost savings profile
- N. Test

ACT 306: GASB 34

- A. GASB 34 overview
- B. Fund structure
- C. Fund statements
- D. Government-wide financial statements
- E. Capital assets reporting requirements
- F. Reconciliations
- G. MD&A
- H. Budgetary reporting
- I. Changes in the financial accounting and reporting (FAR) module
- J. Implementation of GASB 34
- K. GASB 34 reporting module
- L. Test

ACT 314: Advanced Debt Planning and Management

- A. Review of demographic analyses, district facility information, bond project planning and bond election strategies
- B. Selling school bonds
 1. Bond basics
 2. Types of bonds
 3. Bond ratings
 4. Financial advisor
 5. Underwriters
 6. Bond counsel
 7. General rules

- 8. Primary and secondary markets
- C. Attorney General tests and approval
- D. Debt structure
- E. Permanent school fund
- F. Bond insurance
- G. Bond portfolio management
- H. Test

ACT 315: Property Taxation and Texas Schools

- A. Taxation in general
- B. Property tax law
- C. Stakeholder roles in the property tax system
- D. The tax calendar
- E. Appraisal methods, special appraisals and exemptions
- F. Equalization
- G. Assessing
- H. Collections
- I. The property value (ratio) study
- J. What the future holds
- K. Test

ACT 402: The Project (optional)

The title and description of the project must be approved by the Accounting Review Panel. Refer to Project Guidelines and Requirements in Section II.

B. Distribution and Inventory Curriculum

DIS 101: Materials Management for School Districts

- A. Overview of materials management
 - 1. Business functions
 - 2. Logistics
 - 3. Materials management
- B. Customer service
 - 1. Goals and objectives
 - 2. Time factors
 - 3. Dependability factors
 - 4. Convenience factors
 - 5. Communication factors
- C. Purchasing interface
- D. Inventory
 - 1. Inventory systems
 - 2. Economic order quantity
 - 3. Inventory reordering procedures
- E. Warehouse
 - 1. Warehouse/distribution centers
 - 2. Warehouse designs
 - 3. Space requirements
 - 4. Warehouse operations
- F. Test

DIS 102: Distribution Design and Equipment

- A. Physical plant design
 - 1. New construction versus existing facility
 - 2. Space management
 - 3. Shipping area
 - 4. Receiving area
 - 5. Storage area
 - 6. Administrative support area
- B. Recordkeeping
 - 1. Manual system
 - 2. Automation
- C. Storage aids
- D. Locator system
 - 1. Types of locator systems
 - 2. Establishing location system
 - 3. Maintaining location system
- E. Equipment
 - 1. Material handling equipment
 - 2. Fixed equipment
 - 3. Miscellaneous equipment
- F. Safety
- G. Test

DIS 104: Overview of Textbook Management

(Same as Textbooks 101)

- A. Cover the complete annual cycle of textbook management
- B. Review TEA requirements regarding sampling and selection of new books
- C. Determining allocation
- D. Completing the TEA report
- E. Recommendations for receiving, processing and distribution for schools with and without loading docks
- F. Money-saving tips for replacing books
- G. Information on decreasing textbook losses
- H. Test

DIS 105: Overview of Distribution Functions

- A. Delivery services: warehouse, mail, textbooks, payroll and others
- B. Customer service
- C. Auctions
- D. Donations
- E. Copy centers
- F. Food service
- G. Fixed assets
- H. Test

DIS 201: Distribution Personnel Issues

- A. Job descriptions and ADA.
- B. Hiring practices/staff selection/dismissals
- C. Employee rights and benefits
- D. Training and development
- E. Counseling
- F. Safety
- G. Test

DIS 202: Warehouse Shipping/Receiving

(Same as Textbooks 202)

- A. Receiving operations
- B. Storage functions
- C. Shipping operations
- D. Developing schedules and daily routines
- E. Warehouse-keeping functions
- F. Standards
- G. Material handling
- H. Test

DIS 204: Inventory Management

- A. Overview of inventory management
- B. What to order, when to order, and how much
- C. The Store Keeping Unit (SKU)
- D. Location systems
- E. Inventory accuracy
- F. Physical inventories
- G. Cycle counting
- H. Non-moving inventory
- I. Appendix
- J. Test

DIS 301: Specialty Warehousing

- A. Basic concepts and principles
- B. School/Office supplies
- C. Maintenance/Custodial/Transportation
- D. Records storage
- E. Textbooks
- F. Child nutrition
- G. Miscellaneous specialty products
- H. Test

DIS 302: Purchasing/Stock Management

(Same as Purchasing 302)

- A. Purchasing process
 - 1. Elements of a contract
 - 2. Purchasing process
 - a. Needs/requirements determination
 - b. Solicitation
 - c. Evaluation
 - d. Award
 - e. Administration
- B. Selecting items for stock
- C. Establishing levels
- D. Stock review
- E. Test

DIS 303: Foundations for New or Existing Distribution Centers

THIS COURSE IS NO LONGER OFFERED

DIS 402: The Project (optional)

The title and description of the project must be approved by the Distribution and Inventory Review Panel. Refer to Project Guidelines and Requirements in Section II.

C. Graphics Communications Management (currently inactive)

Graphics Communications Management 101: Overview

- A. Definition
- B. Scope of publication and printing services
- C. Pros and cons of an in-plant operation
- D. Qualifications for an in-plant manager
- E. Departmental goals and objectives
- F. Tools and techniques of program evaluation
- G. Test

Graphics Communications Management 102: Technical Skills

- A. Technical skills for an in-plant operation
 - 1. Computer applications
 - 2. Layout and design
 - 3. Electronic pre-press
 - 4. Camera and platemaking
 - 5. Offset printing
 - 6. Copiers
 - 7. Bindery
 - 8. Shipping
- B. Test

Graphics Communications Management 103: Personnel Management

- A. Organizational role of the department
- B. Attracting, developing and retaining qualified employees
- C. Federal, state and local policies
- D. Acceptable personnel practices and standards
- E. Leadership and motivational skills
- F. Test

Graphics Communications Management 201: Production Management

- A. Human resource requirements for a publications and printing department
- B. Manufacturing processes for an in-plant operation
- C. Aspects of facilities planning
- D. Production control systems
- E. Inventory and warehousing needs and practices
- F. Production standards of quality
- G. In-plant safety requirements
- H. Test

Graphics Communications Management 202: Financial Management

- A. Accounting and financial practices
- B. Cost accounting objectives and methodology
- C. Budget processing cycle

- D. Inventory management skills
- E. Analyzing and interpreting operating results
- F. Test

Graphics Communications Management 402: The Project (optional)

The title and description of the project must be approved by the Graphics Communications Management Review Panel. See Project Guidelines and Requirements in Section II.

D. Information Technology Curriculum (formerly MIS)

ITC 101: Fundamentals of Data Processing

THIS COURSE NO LONGER OFFERED.

ITC 105: Internet Fundamentals

THIS COURSE NO LONGER OFFERED.

ITC 106: Introduction to Web Page Development

- A. Introduces concepts needed for web page development
- B. Using current software products, produce web pages and learn techniques for web page design
- C. Test

ITC 201: Administrative and Education Applications

THIS COURSE NO LONGER OFFERED.

ITC 202: Basic Spreadsheet

- A. Introduction to basic spreadsheet
- B. Specific skill development in:
 - 1. Building, modifying and printing a spreadsheet
 - 2. Working with ranges of text
 - 3. Using special function keys
 - 4. Formula development
- C. Creation of multiple spreadsheets and summaries
- D. Understanding macro uses
- E. Executing prepared macros
- G. Preview and printing
- F. Test

ITC 203: Advanced Spreadsheet

An advanced course for persons already using spreadsheets. Knowledge and experience with basic spreadsheets is required.

- A. Viewing and printing various types of graphs
- B. Creating and using macros
- C. Data commands - data query/data sort
- D. Advanced functions and formulas-math functions, statistical functions, logical functions, financial functions, using lookup tables
- E. Importing data
- F. Test

ITC 204: Intermediate Word Processing

This is an intermediate course for those already using a word processing application.

- A. Formatting
 - 1. Borders and shading
 - 2. Bullets and numbering (multilevel)
 - 3. Styles

- B. Templates
- C. Wizards
- D. Tables and columns
- E. Footnotes and endnotes
- F. Grammar, thesaurus, word count, and statistics
- G. Mail merge, labels, and envelopes
- H. Test

ITC 205: Introduction to Relational Databases

A beginning course for those wanting to learn about relational databases.

- A. Identify basic database concepts and learn database terminology
- B. Move through tables in datasheet view and form view
- C. Sort and search for records
- D. Edit, add, and delete records in datasheet view and form view
- E. Enhance table views and replace specific data
- F. Create and modify table structures with Table Wizards
- G. Create a query and display specific records
- H. Build a customized report with Report Wizards
- I. Test

ITC 206: Intermediate Relational Databases

An intermediate to advanced course for persons wanting to learn more advanced relational database skills

- A. Use the Add-In manager
- B. Open an external database using a query tool Add-In
- C. Create, save and edit a query
- D. Work with query results
- E. Use the Scenario Add-In
- F. Create and manage scenarios
- G. Summarize scenarios
- H. Consolidate worksheets
- I. Create, edit and run a slideshow that uses worksheet data
- J. Test

ITC 207: Current Networking Options

A course designed for those who wish to survey current networking options.

- A. Present samples of most commonly used network wiring and fiber cables.
- B. Present a working vocabulary of commonly used networking protocols involved in current installations of data networks
- C. Demonstrate how one network may integrate with another (one vendor to another)
- D. Explanation of what is involved in routing and switching today's networks from LANS to WANS
- E. Base introduction into client to server communications and peer to peer networks and what protocols/packages are necessary to perform each
- F. Explanation of the difference between the LAN and the WAN
- G. Present concepts of network flow and the importance of good network design
- H. Test

ITC 208: Introduction to Presentation Software

This course is designed to help make meeting presentations consisting of electronic slide shows through the use of presentation software. This course will cover how to make presentations, incorporate data from spreadsheets, databases and word processing files, and add special effects such as color and motion to screens. Tips on creating presentations that help to attract and keep the audience's attention will be shared.

- A. Introduction to presentation software
 - 1. Presentation overviews
 - 2. Design ideas
 - 3. Content software
- B. Creating presentations
 - 1. Wizard/template/blank
 - 2. Overview of slide/outline mode
 - 3. Adding transitions and builds
- C. Changing the features on each slide
 - 1. Add color/shading
 - 2. Add clip art to presentation
 - 3. Add graphs, charts, Excel spreadsheets
- D. Changing views/masters
 - 1. Change slide master to include typed text on each page
 - 2. Changing font of title for each page
 - 3. Changing slide color scheme
- E. Test

ITC 209: Multi-media Presentation Tools and Development

- A. Learn how to design and develop multimedia presentations for colleagues and constituents using:
 - 1. Presentation software
 - 2. Digital scanning
 - 3. Digital camera
- B. Test

ITC 211: Intermediate Web Page Development

- A. Use of web development software
- B. Content management tools
- C. Use of style sheets
- D. Test

ITC 300: Survey of MIS Software Toolkits

THIS COURSE NO LONGER OFFERED - CURRICULUM MERGED WITH ITC 207.

ITC 302: Integrating Microsoft Office Applications

- A. Discover the features of Microsoft Office, which includes:
 - 1. Word

2. Excel
 3. Outlook
 4. PowerPoint
 5. Publisher
- B. Test

ITC 303: MIS Management Issues

Covers areas of ITC operations that require management and how to formulate a progressive and planned approach to those issues.

- A. Personnel management issues
 1. Hiring technical staff
 2. Time management
 3. Salary structures (position structures)
- B. Project management
 1. Software engineering
 2. Code maintenance procedures (flowcharts, documentation)
 3. Meeting timelines
- C. User request procedures
 1. Request procedure manual/guidelines
 2. Task assignment
 3. Testing cycles
 4. Customer notification
- D. Disaster recovery plans
 1. Samples with points of interest
 2. Financial concerns-insurance/collateral/lead-times
 3. Offsite backups
 4. Peer district agreements
- E. Security issues
 1. Security authorization procedures
 2. Monitoring/auditing of security
- F. Test

ITC 304: District Wide Networking

THIS COURSE NO LONGER OFFERED.

ITC 305: Microsoft Project

- A. Define the project
- B. Define and modify tasks
- C. Specify and assign resources
- D. Track progress
- E. View and report project status
- F. Manage multiple projects
- G. Creating a project plan
- H. Tracking a project
- I. Communicating project information
- J. General project management concepts

- K. Customizing a project
- L. Multi-project management
- M. Test

ITC 402: The Project (optional)

The title and description of the project must be approved by the Information Technology Review Panel. See Project Guidelines and Requirements in Section II.

E. Information Technology Management

ITM 101: IT Service Operations

Gain an understanding of the technology program in school business. Includes primary functions such as:

- A. Student accounting
- B. Financial management
- C. Technology support and service operations
- D. Network infrastructure and integration
- E. Facilities
- F. Test

ITM 102: Technology Workforce Improvement

- A. Provide employees with the skills, knowledge and resources necessary for success.
- B. Reinforce skills and knowledge on the job.
- C. Encourage collaboration and innovation.
- D. Measure and improve employee involvement and satisfaction.
- E. Test

ITM 201: Technology Leadership

- A. Integrate the district's mission and values into the organization.
- B. Create a sustainable organization.
- C. Set performance expectations and monitor progress.
- D. Use feedback to improve leadership effectiveness.
- E. Test

ITM 202: Technology Planning

- A. Develop and deploy the strategic plan.
- B. Budget and performance projection and acquisition.
- C. Set strategic goals, action plans, and performance measures.
- D. Identify and integrate ethics and regulatory requirements.
- E. Test

ITM 301: Technology Process Management

- A. Examine and improve the technology organization's way of performing work and providing services (Plan-Do-Study-Act)
- B. Collaborate with partners and suppliers to improve services.
- C. Incorporate emerging technologies into work processes.
- D. Improve core competencies.
- E. Test

ITM 302: Managing Technology Needs and Expectations

(to be developed)

ITM 303: Technology Measurement, Analysis and Knowledge Management
((to be developed))

ITM 304: Managing Technology Results

- A. To become aware of how results are evaluated.
- B. To become aware of the challenges and activities required when transitioning to a results based management system.
- C. To become aware of the factors that are vital for a results based strategy to be successful.
- D. To become aware of how organizational alignment affects the ability to support key organization-wide goals.
- E. To become aware of how results are used to create and balance value for students and key stakeholders, using the TASBO PEP program model.
- F. To become aware of what good reporting of results looks like and the various methods for doing so.
- G. To become aware of how the TASBO Performance Excellence Program (PEP) results are measured by maturity, gauged by results and the processes that have produced those results.
- H. To become aware of benchmarking and best practices as a means to the best possible way of doing something.
- I. To develop a knowledge of how best practices are embedded beliefs and behaviors found in high performing organizations.
- J. To develop a knowledge of how to define key benchmarks in the area of Technology Results.
- K. Test

ITM 402: The Project (optional)

The title and description of the project must be approved by the Information Technology Review Panel. See Project Guidelines and Requirements in Section II.

F. Maintenance & Operations Curriculum

MAO100: Basic Systems Overview

- A. Heating, ventilation & air conditioning
- B. Preventative maintenance
- C. Roofing systems
- D. Floor coverings
- E. Key lock systems
- F. Grounds - equipment and maintenance
- G. Kitchen facilities
- H. Fire alarm systems
- I. Intercom systems
- J. Paints
- K. Plumbing
- L. Electrical
- M. Test

MAO101: Introduction to Plant Maintenance and Operations

- A. The role of MAO in the education process
- B. Relationship with educational staff
- C. Custodial staffing
- D. Staff scheduling
- E. Methods of administering supervisors
- F. Inspections and evaluations
- G. Budgeting
- H. Technology, equipment, materials, and supplies
- I. Inventory management of equipment and supplies
- J. Community use of facilities
- K. In-House vs. contract service
- L. Test

MAO102: Introduction to Plant Maintenance

THIS COURSE NO LONGER OFFERED; CURRICULUM COMBINED WITH MAO 101 ABOVE

MAO103: Custodial Staffing and Organization

- A. How to assess the job
- B. Key elements in developing standards
- C. Work schedules/job assignments
- D. Methods for organizing custodial service
- E. The essential elements in training
- F. Managing and motivating
- G. Computer model(s) for staffing
- H. Contracting vs. in-house vs. combination
- I. Test

MAO104: Custodial Management

THIS COURSE IS NO LONGER OFFERED

**MAO201: Planning & Administering
School Construction Projects**

- A. TEA facility standards
- B. Educational specifications
- C. Selecting the architect
- D. Construction administration
- E. Problem avoidance during the construction
- F. Construction of special facilities
- G. Bringing construction to a close
- H. Total building commissioning
- I. Test

MAO202: Customizing your Energy Management

- A. Energy costs in Texas schools; potential for savings; energy management
- B. Setting up an energy management program
- C. Understanding utility bill technology and rate schedule
- D. Utility deregulation: the potential for impact on schools
- E. Energy accounting
- F. Financing energy controls
- G. Students and staff involvement in the energy plan
- H. Test

MAO203: Understanding and Applying Building Energy Technology

- A. Understanding building energy use
- B. Light fundamentals
- C. Heating, ventilation, and air conditioning systems
- D. Indoor air quality and refrigeration phase-out issues
- E. Energy management controls
- F. Master planning energy management projects
- G. Roof management, inspections and repairs
- H. Test

MAO204: Environmental and Regulatory Compliance

- A. Haz/Com and Right to Know
- B. Indoor air quality (IAQ)/Indoor environments
- C. Waste management
- D. Blood-borne pathogens
- E. Clean Air Act
- F. Integrated pest management

- G. Americans with Disabilities Act (ADA)
- H. Asbestos awareness training
- I. Test

MAO301: Emergency Planning and Management

- A. School emergency plans
 - 1. Development and writing of the district emergency plan
 - a. Assessment of the problem
 - b. Emergency response agencies
 - c. Personal intervention team
 - d. Reaction to emergencies
 - e. Evacuations
 - f. Shelter management
 - g. Coordination of the emergency plan
 - 2. Response to emergencies
 - a. Fire
 - b. Snow and ice
 - c. Hurricanes
 - d. Dealing with the media
 - e. Terroristic threats
- B. Test

MAO302: Environmental Maintenance

THIS COURSE IS NO LONGER OFFERED - *See MAO 204*

MAO303: Human Resource Management for M&O

- A. Aspects of the job; how it fits into the district's objectives
- B. Hiring and training process and programs
- C. Evaluations
- D. Legal aspects of supervision
 - 1. Equal Employment Opportunities
 - 2. Grievances-civil and criminal
 - 3. Affirmative action
 - 4. Discipline and termination
 - 5. Guidelines to follow
- E. Important management aspects
- F. Development of operations manual/procedure book
- G. Test

MAO304: Management of Maintenance Activities

- A. Mission of the maintenance department
- B. Repair of buildings and equipment
- C. Maintenance policy
- D. Organizational approaches
 - 1. Shops by trade
 - 2. Multi-trade zone shop
 - 3. Multi-skill trades

- 4. Contracted services
- 5. Satellite facilities
- E. Manning of maintenance functions
- F. Warehouse standardization
- G. Test

MAO305: Technical Applications of Energy Management & Engineering

THIS COURSE IS NO LONGER OFFERED

MAO306: Setting Up an Energy Management Program

THIS COURSE IS NO LONGER OFFERED - *See MAO 202*

MAO307: Long Range Maintenance & Operations Planning

- A. State profile
- B. National Clearinghouse for Educational Facilities
- C. Facilities assessments
- D. State guidelines for facilities
- E. Performance review template
- F. Test

MAO402: The Project (optional)

The title and description of the project must be approved by the MAO Review Panel. See Project Guidelines and Requirements in Section II.

G. Management Curriculum

MGT 301: Functions and Duties of School Business Administrators

- A. School business official competency studies
- B. Components and competencies for school business and support service personnel in Texas
- C. Organization of non-instructional services
- D. General goals and strategies for non-instructional areas
- E. Long range planning
- F. Financial management problems in Texas
- G. Financial management tools
- H. Ethics
- I. Future trends in school business management
- J. Test

MGT 302: Introduction to Education for School Business Officials

THIS COURSE IS NO LONGER OFFERED

MGT 303: Approaches to Leadership & Management

- A. TASBO Components and Competencies
- B. Role of leadership and management in school business and operations
- C. Challenges faced by school business officials
- D. Approaches to leadership
- E. Attendees self-assessment using Gregorc Style Delineator
- F. Supervisor as leader
- G. Approaches to motivation of staff
- H. Approaches to management
- I. Management of subordinates, supervisors and others
- J. Time management for effective leaders
- K. Test

MGT 304: Real Estate Management

THIS COURSE IS NO LONGER OFFERED

MGT 305: Compensation Management

- A. Basis and policy
- B. Legal aspects and considerations (FSLA, FMLA, etc.)
- C. Methods of distribution
- D. Budgeting for compensation
- E. Sample plans
- F. Administration of benefits
- G. Trends in compensation
- H. Long-range planning
- I. Test

MGT 306: Board Policies and Administrative Procedures

- A. Board policies

- B. Types of policies
- C. Regulations
- D. Board minutes and board meetings
- E. Guidelines for videotaping and tape recording open meetings
- F. Effectively communicating the budget to stakeholders
- G. Test

MGT 307: Business Ethics

- A. Definition
- B. How ethical values are developed
- C. Ethical values vs. the law
- D. Identifying organizational and/or community ethical standards
 - 1. Determining legality
 - 2. Determining ethical practices
- E. Coping with unethical people
- F. Ethical guidelines for decision making
- G. Test

MGT 308: Effective Communications

- A. Five basic elements of the communications process
- B. Four styles of communication patterns
- C. Communication preferences and adaptability
- D. Active listening
- E. Clarifying feedback
- F. Creating a powerful image
- G. It's how you say it
- H. Time talks
- I. Presentation power
- J. Public relations
- K. Open meetings act
- L. Tips for presentations
- M. Test

MGT 309: Business Administration and the Law

- A. Education is function of state
- B. Employee hiring procedures
- C. Use of independent contractors
- D. Access to personnel records
- E. Political/union and professional organization activities
- F. The Texas Whistleblower Act
- G. Legal issues concerning reductions in force (RIF)
- H. Special education hearings
- I. School accidents: handling liability issues relating to school district-owned vehicles
- J. Harassment in the workplace
- K. Test

MGT 310: Long Range Planning

- A. Goal setting
- B. Needs assessment
- C. Major construction and maintenance
- D. Enrollment and staffing projections
- E. Capital asset plans
- F. Long-range budget and financial models
- G. Test

MGT 311: Administering School Elections

THIS COURSE IS NO LONGER OFFERED

MGT 312: Property Tax Management- Impact on School Funding

THIS COURSE IS NO LONGER OFFERED - SEE ACT315

MGT 313: Service Efforts & Accomplishments Reporting

THIS COURSE IS NO LONGER OFFERED

MGT 314: Managing School Bonds

THIS COURSE IS NO LONGER OFFERED - SEE ACT314.

MGT 315: Planning and Administering School Construction Projects

THIS COURSE IS NO LONGER OFFERED- SEE MAO 201.

MGT 316: Site-based Management Overview

THIS COURSE IS NO LONGER OFFERED

MGT 317: Financial Essentials for Non-Accountants

(For students with no accounting background)

Surveys common essential accounting topics including:

- A. Overview
 - 1. Mission
 - 2. Goals
 - 3. Objectives
- B. Account coding
- C. Employee/independent contractor determination
- D. Managing budgets
- E. Replacement schedules
- F. Cost accounting
- G. Financial reporting
- H. Internal controls
- I. Test

MGT 318: Cost Accounting for Accountants

(For students with accounting background)

- A. Introduction

- B. Cost control and analysis
- C. Cost accounting system
- D. Federal/state administrative requirements and cost principles
- E. Special population funds
- F. Application of GASB statements
- G. Enterprise/internal service funds
- H. Test

MGT 319: Records Management in Texas Schools

- A. Local Government Records Act
- B. District policies and records management responsibilities
- C. Records management plan
- D. Compliance
- E. Retention/disposition of records
- F. Electronic records program
- G. Disaster recovery plan
- H. File management
- I. Test

MGT 402: The Project (optional)

The title and description of the project must be approved by the Professional Certification Review Panel. Refer to Project Guidelines and Requirements in Section II.

H. Payroll Curriculum

PAY 101: Introduction to Payroll

- A. The payroll process
- B. Payroll balancing
- C. Budget coding
- D. Payroll accounting
- E. Using sample forms
- F. Legal requirements for payroll
- G. Glossary of terms
- H. Test

PAY 201: Federal Payroll Taxes

- A. Verification of employment eligibility
- B. Worker classification for taxing purposes
- C. Employee withholding and advanced earned income credit
- D. Wages and other compensation
- E. Calculating and withholding tax
- F. Depositing federal employment taxes
- G. Employer's quarterly federal tax return, Form 941
- H. Wage and tax statements, Form W-2
- I. Miscellaneous income statement, Form 1099 MISC
- J. Federal tax levy
- K. Social Security and Medicare-local government employees
- L. Test

PAY 203: Bridging the Gap between Payroll and Personnel

(Same as Personnel 203)

- A. Communication between departments
 - 1. Diversity
 - 2. Team concept
 - 3. Conflict resolution
 - 4. Non-verbal communication
- B. Forms and procedures developed from communication between departments
- C. Communication role playing
- D. Test

PAY 204: Year-end Reporting Process

- A. Calendars
 - 1. Timelines
 - 2. Deadlines
- B. Reporting
 - 1. Federal
 - 2. State
 - 3. Local
- C. Balancing
- D. Texas Employment Commission reporting
- E. Test

PAY 205: Leaves and Absences

(Same as Personnel 205)

- A. Legal requirements related to leaves and absences.
- B. Legal requirements related to the Family and Medical Leave Act.
- C. Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)
- D. Mandated state leave programs and local programs.
- E. Managing leave and absences programs and legal requirements as they relate to the programs.
- F. Test

PAY 206 TRS/TRAQS Reporting

- A. Function and purpose of Teacher Retirement System (TRS)
- B. Identification and completion of TRS forms
- C. Different types of TRS service credit
 - a. Applying
 - b. Processing
 - c. Obtaining
- D. Laws regulating employment after retirement
- E. TRAQS reporting system
- F. Test

PAY 301: Employee Benefits Plan

- A. Examination of Section 403(b) tax sheltered annuities; Section 457 Deferred Compensation plans of state and local governments; Section 125 Cafeteria Plans; and Social Security and Medicare issues for local-government employees.
- B. Class participation in calculating exclusions amounts for Section 403(b) annuities and annual ceiling amounts for Section 457 plans.
- C. Test

PAY 302: Payroll Administration

- A. Fair Labor Standards - wage and hour
- B. Family Medical Leave Act issues/workers' compensation/unemployment
- C. Employee benefits
- D. Garnishments
- E. Worker classifications
- F. Employment eligibility
- G. Withholding and reporting rules for nonresident aliens
- H. Payroll records retention
- I. Payroll aspects of workers' compensation
- J. Test

PAY 303: COBRA/HIPAA Compliance

- A. Compliance responsibilities
- B. HIPAA

1. Purpose
 2. Enrollment
 3. Administration
 4. Privacy
 5. Types of insurance plans
- C. COBRA
1. Basics
 2. COBRA plans
 3. Qualifying events
 4. Timeline
- D. Test

PAY 304: Fair Labor Standards Act Administration

(Same as Personnel 304)

- A. History of the FLSA
- B. Major provisions
- C. What the FLSA does not require
- D. Hours worked
- E. FLSA E-laws
- F. Minimum wage provisions
- G. Overtime
- H. Compensatory time off
- I. Determining exempt status and exemption tests
- J. Child labor
- K. Recordkeeping and required records
- L. Common errors to avoid
- M. Enforcement, investigations, and penalties
- N. Test

PAY 402: The Project (optional)

The title and description of the project must be approved by the Payroll Review Panel. See Project Guidelines and Requirements in Section II.

I. Personnel Curriculum

PER 101: Introduction to Personnel

- A. Types of school personnel
 - 1. Professional
 - 2. Paraprofessional
 - 3. Auxiliary
- B. Classifications of school personnel
 - 1. Full-time/part-time regular vs. temporary
 - 2. Staff to student ratios
 - 3. Position control
 - 4. Exempt vs. nonexempt
 - 5. Employment at will
 - 6. Notification to employee
- C. Legal & policy issues
- D. Employee compensation
 - 1. Salary determination
 - 2. Work schedule, recording work hours, and overtime compensation
 - 3. Types of reimbursements
 - 4. Pay procedures
- E. Employee benefits
 - 1. Elements of the group health benefit package
 - 2. Workers' compensation
 - 3. Unemployment compensation
 - 4. COBRA coverage
 - 5. Teacher Retirement System
 - 6. Time-off benefits: types of leaves
- F. Performance vs. conduct
- G. Complaint resolution procedures
- H. Employee privacy and personnel records management
- I. Communication between personnel and the business office
- J. Test

PER 102: Employee Handbook

THIS COURSE IS NO LONGER OFFERED

PER 201: Certification of Professional Employees

- A. Governmental agencies that control certification
- B. Overview of certification types
 - 1. Administrative
 - 2. Teacher
 - 3. Paraprofessional
- C. EXCET overview, application procedures
- D. Alternative certification programs
- E. Teaching outside area of certification
- F. Emergency/hardship certification/permits
- G. Additional certification endorsements
- H. Recertification requirements

- (if/when new state certification program is adopted)
- I. Credentials and how to read them
(GPA, sem/qtr hours accredited/unaccredited)
 - J. Verifying service records, criminal history, drug testing
 - K. Renewal/non-renewal of teaching contract
 - L. Revocation/suspended of teaching certification
 - M. Certification records management
 - N. Test

PER 202: The Employment Process

- A. Recruitment and applications
- B. Selection, probation, and placement
- C. Staff development
- D. Job descriptions
- E. Employee handbook
- F. Job performance and evaluation
- G. Contract and certification status
- H. Test

PER 203: Bridging the Gap between Personnel and Payroll

(Same as Payroll 203)

- A. Communication between departments
 - 1. Diversity
 - 2. Team concept
 - 3. Conflict resolution
 - 4. Non-verbal communication
- B. Forms and procedures developed from communication between departments
- C. Communication role playing
- D. Test

PER 204: Personnel Management

- A. Employee classification
- B. FLSA requirements
- C. Employee conduct and documentation
- D. Change in status
 - 1. Advancement
 - 2. Transfers
 - 3. Disciplinary
 - 4. Termination of service
 - 5. Reduction in force
- E. Complaints and grievances
- F. Test

PER 205: Leaves & Absences

(Same as Payroll 205)

- A. Legal requirements related to leaves and absences.
- B. Legal requirements related to the Family and Medical Leave Act.

- C. Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)
- D. Mandated state leave programs and local programs.
- E. Managing leave and absences programs and legal requirements as they relate to the programs.
- F. Test

PER 301: Personnel Policies

- A. Personnel policies summarized in employee handbook
 - 1. Purpose of handbook
 - 2. Components of handbook
 - 3. Resources to use when compiling a handbook
- B. Purpose of personnel policies
- C. Roles of administration and board
- D. Overview of policy structure
- E. Amending policies
- F. Personnel policies
 - 1. Employment objectives
 - 2. Employment requirements and restrictions
 - 3. Employment practices
 - 4. Compensation and benefits
 - 5. Termination of employment
 - 6. Employee rights and privileges
 - 7. Employee standards of conduct
 - 8. Employee welfare
 - 9. Employee recognition and awards
 - 10. Assignment and schedules
 - 11. Work load
 - 12. Professional development
 - 13. Performance appraisal
 - 14. Personnel positions
- G. Test

PER 302: Fundamentals of Management

THIS COURSE IS NO LONGER OFFERED.

PER 303: School Personnel Law

- A. Introduction to Texas school personnel law
- B. Insurance protection
- C. Hiring
- D. Buying people's time
 - 1. Shared services agreements
 - 2. Third party contracts
 - 3. Independent contractors
- E. Employee benefits
- F. Terminations

- G. Employee policies, procedures and handbooks
- H. Test

PER 304: Fair Labor Standards Act Administration

(Same as Payroll 304)

- A. History of the FLSA
- B. Major provisions
- C. What the FLSA does not require
- D. Hours worked
- E. FLSA E-laws
- F. Minimum wage provisions
- G. Overtime
- H. Compensatory time off
- I. Determining exempt status and exemption tests
- J. Child labor
- K. Recordkeeping and required records
- L. Common errors to avoid
- M. Enforcement, investigations, and penalties
- N. Test

PER 305: Personnel Issues & Service Credit

- A. Creditable years of service for classroom teachers, full-time librarians, full-time counselors, and full-time registered nurses
- B. Private schools, colleges and universities accreditation, and the difference between public and private schools, colleges and universities;
- C. Full-time teachers, full-time librarians, full-time counselors, and full-time registered nurses placement on the minimum salary schedule and salary calculation
- D. Teacher service record
- E. Various leave policies and transferability of leaves
- F. Military service
- G. Substitute teaching experience
- H. Teaching aide experience
- I. Procedures for verifying years of professional experience outside the U.S.
- J. Test

PER 402: The Project (optional)

The title and description of the project must be approved by the Personnel Review Panel. Refer to Project Guidelines and Requirements in Section II.

J. Public Education Information Management Systems (PEIMS) Curriculum

PEI 101: PEIMS Accuracy: Preparation (Student Attendance Accounting Handbook)

- A. Overview
- B. Audit requirements
- C. General attendance
- D. Quality assurance
- E. Data usage
- F. Timelines
- E. Test

PEI 102: PEIMS Accuracy: Reporting (PEIMS Data Standards)

- A. Data usage
- B. Quality assurance
- C. TEA PEIMS Data Standards
- D. Responsibilities, timelines and checklists
- E. EDIT +
- F. Test

PEI 103: PEIMS Accuracy: Special Populations and Programs

- A. Special education
- B. Career and Technical education
- C. Bilingual/English as a Second Language
- D. Prekindergarten
- E. Gifted and Talented
- F. PRS
- G. Nontraditional school
- H. Nontraditional programs
- I. Test

PEI 104 Focus on EDIT+

- A. EDIT+
- B. EDIT + External Homepage
- C. EDIT + Internal Process
- D. Test

PEI 201: Techniques for Improving PEIMS Data Quality

Course prerequisites: PEI101 and PEI102 or working knowledge of SAAH and PEIMS Data Standards)

- A. The need for a PEIMS master plan
- B. Timelines
- C. Checklists
- D. Sample forms
- E. Resources
- F. Test

PEI 202: Excel®-ing Your PEIMS Data

- A. Recognize how to utilize the PEIMS EDIT+ table download to 3rd party spreadsheet
- B. Understand how to perform an EDIT+ table download
- C. Understand how to import a PEIMS data file into Excel®
- D. Learn how to create a report in Excel® using PEIMS data
- E. Understand how to utilize Excel® reports to increase data quality
- F. Test

PEI 203: PEIMS Focus Topic: Discipline Details

- A. Understand the components of the 425 record.
- B. Learn details of Discipline Data elements.
- C. Learn details of Discipline Code Tables.
- D. Understand how to read and understand Discipline Edits.
- E. Learn how discipline reporting links to accountability.
- F. Learn how to read the reports.
- G. Learn how to improve discipline data quality.
- H. Test

PEI 204: Focus on Finance

- A. Understanding PEI MS
- B. Required budget and actual date for Submissions 1 & 2
- C. PEIMS Data Standards
- D. PEIMS Edit +
- E. Test

PEI 301: Administrator Overview of PEIMS

- A. Requirements
- B. Financial implications
- C. Elements of the source of state and federal funds
- D. Data-driven decision making
- E. Accountability ratings
- F. PEIMS Data Standards
- G. EDIT + reports
- H. Data quality assurance, audits and compliance issues
- I. Test

PEI 302: PEIMS: The Foundation for Accountability

- A. Accountability Umbrella
- B. State Accountability system regarding financial data
- C. State Accountability system regarding student data
- D. Accountability system for Federal Accountability regarding student data
- E. Indicators for Performance Based Monitoring (PBM)
- F. Reviewing PEIMS Edit + Reports as they reflect accountability data

PEI402: The Project (optional)

The title and description of the project must be approved by the PEIMS Review Panel.
Refer to Project Guidelines and Requirements in Section II.

K. Purchasing and Supply Management Curriculum

PUR 101: Introduction to Purchasing and Supply Management

- A. The purchasing department
- B. Legal basis in Texas
- C. Texas Attorney General's opinion
- D. Ethics in purchasing
- E. Test

PUR 102: The Purchasing Law (Non-construction)

- A. Legislative laws
- B. Formal bid procedures
- C. Quotation and telephone procedures
- D. Advertising requirements
- E. Criteria for awarding bids
- F. Attorney General's opinion
- G. Test

PUR 103: Purchasing Contracts

- A. Uniform Commercial Code
- B. Negotiating/managing/comparing contracts and resolving conflicts
- C. Types of contracts
- D. Examples of contracts
- E. Lengths of contracts
- F. e-Rate contracts
- F. Test

PUR 104: Purchasing for Buyers and Purchasing Support Personnel

THIS COURSE IS NO LONGER OFFERED

PUR 201: Purchasing Standards and Specifications

- A. Standards
 - 1. Definitions
 - 2. Benefits
- B. Specifications
 - 1. Definitions
 - 2. Advantages & disadvantages
 - 3. Requirements
 - 4. Methods of describing quality
 - 5. Outline
 - 6. Sources
- C. Examples of specifications
- D. Bid documents
 - 1. Cover letter
 - 2. General terms & conditions
 - 3. Specifications
 - 4. Bid form
 - 5. Other forms

- E. Examples of bids
- F. Test

PUR 202: Inventory and Fixed Asset Control

THIS COURSE IS NO LONGER OFFERED

PUR 203: The Purchase of Insurance and Related Services

(Same as Risk Management 203)

- A. Risk management overview
- B. Legal requirements related to purchasing insurance
- C. Insurance marketplace
- D. Brokers and agents - services and selection
- E. Bidding for insurance
 - 1. Purpose of bidding
 - 2. Drawbacks of bidding
 - 3. Frequency of bidding
 - 4. Bidding timeline
- F. Types of bids and specification content
- G. Guidelines for bid specifications and request for proposals
 - 1. Property and casualty coverage
 - 2. Medical coverage
 - 3. Workers' compensation coverage
 - 4. Flexible benefits
- H. Evaluating insurance carriers, pools, and third party administrators
 - 1. Financial stability
 - 2. Insurance rating services
 - 3. Reinsurance
 - 4. Exclusions
- I. Test

PUR 204: Construction Law

(To be developed)

PUR 301: Cooperative Purchasing

- A. Local cooperatives
- B. State contracts
- C. Role of a cooperative purchasing program
- D. Program benefits
- E. Legal basis and governance of the program
 - 1. Review of interlocal agreements
 - 2. Board authorization
- F. Leadership role of cooperative purchasing board
- G. Organization of a cooperative program
 - 1. Development of item specifications
 - 2. Program calendar
- H. Test

PUR302: Purchasing/Stock Management

(Same as Distribution & Inventory 302)

- A. Purchasing process
 - 1. Elements of a contract
 - 2. Purchasing process
 - a. Needs/requirements determination
 - b. Solicitation
 - c. Evaluation
 - d. Award
 - e. Administration
- B. Selecting items for stock
- C. Establishing levels
- D. Stock review
- E. Test

PUR 303: Competitive Sealed Proposal/ Request for Proposals

- A. Overview of competitive sealed proposal process and request for proposals
- B. Components of an RFP
- C. Advertising requirements
- D. Similarities/differences from an invitation for bids
- E. How to prepare the scope of work
- F. Establishing and evaluating factors for evaluation
- G. Methods of negotiation
- H. Examples of RFP's
- I. Sample guidelines from the federal government
- J. Test

PUR304: Evaluating the Purchasing Operation in Texas School Districts

- A. Scope of where purchasing operations fit into school district audits
- B. Audit procedural operations
- C. Evaluation of the organizational structure
- D. Evaluation of departmental budgets
- E. Components of the purchasing manual
- F. Staff training for skill improvement
- G. Using technology for more efficient and effective operations
- H. Component parts of the contracting process
- I. Auditing the warehouse
- J. Applying evaluation findings to purchasing operations
- K. Test

PUR305: Purchasing for Business Management

- A. Purchasing basics
- B. Legal requirements
- C. Methods of purchasing
- D. Ethical misconduct
- E. Construction guidelines
- F. Use of technology
- G. Sale of public real estate

- H. Capital assets
- I. Test

PUR 402: The Project (optional)

The title and description of the project must be approved by the Purchasing Review Panel. Refer to Project Guidelines and Requirements in Section II.

L. Risk Management Curriculum

RMG 101: Fundamentals of the Risk Management Process

- A. The process and techniques of risk management
- B. Insurance and the structure of the insurance marketplace
- C. Types of insurance contracts:
 - 1. Property insurance
 - 2. Commercial general liability insurance
 - 3. Errors and omissions insurance
 - 4. Automobile liability and physical damage insurance
 - 5. Boiler and machinery insurance
 - 6. Fidelity bonds insurance
 - 7. Umbrella/excess insurance
 - 8. Employee benefits
 - 9. Workers' compensation
 - 10. Unemployment compensation
 - 11. Miscellaneous insurance
- D. Non-insurance issues
 - 1. Americans with Disabilities Act 1990
 - 2. Hazardous Communication Programs
 - 3. Asbestos Hazard Emergency Response Act (AHERA)
 - 4. Other environmental issues
 - 5. Use of pesticides
- E. Glossary of insurance terms
- F. Test

RMG 201: Insurance as a Risk Management Tool

THIS COURSE IS NO LONGER OFFERED

RMG 201A: Property Insurance as a Risk Management Tool

- A. Review of the risk management process
- B. Insurance as a risk financing tool
- C. Comprehensive review of insurance contracts
 - a. Property/casualty insurance
 - b. Boiler and machinery insurance
 - c. Fidelity bonds/crime insurance
 - d. Umbrella/excess insurance
 - e. Crime
- D. Test

RMG 201B: Liability Insurance as a Risk Management Tool

- A. Review of the risk management process
- B. Insurance as a risk financing tool
- C. Comprehensive review of insurance contracts
 - a. Commercial general liability insurance

- b. School Board professional liability insurance
 - c. Automobile liability and physical damage insurance
 - d. Bonds
- D. Test

RMG 202: Risk Financing Alternatives and Methods

- A. Review risk management process
- B. Risk financing
 - 1. Risk retention
 - 2. Risk transfer
- C. Risk financing plans
 - 1. Cash flow plans
 - a. Pain loss retrospective rating plans
 - b. Incurred loss retrospective rating plans
 - c. Compensating balance plans
 - d. Self-insurance
 - e. Pooling
 - f. Fronting plans
 - g. Captives
 - 2. Banking plans
 - 3. Participating insurance
 - 4. Reciprocal contributions
 - 5. Excess aggregate insurance
- D. Case studies
 - 1. Self-Insurance of employee benefit plans
 - 2. Self-Insurance of workers' compensation
 - 3. Other coverage that warrants self-insurance
- E. Test

RMG 203: The Purchase of Insurance and Related Services

(Same as Purchasing 203)

- A. Risk management overview
- B. Legal requirements related to purchasing insurance
- C. Insurance marketplace
- D. Brokers and agents - services and selection
- E. Bidding for insurance
 - 1. Purpose of bidding
 - 2. Drawbacks of bidding
 - 3. Frequency of bidding
 - 4. Bidding timeline
- F. Types of bids and specification content
- G. Guidelines for bid specifications and request for proposals
 - 1. Property and casualty coverage
 - 2. Medical coverage
 - 3. Workers' compensation coverage
 - 4. Flexible benefits
- H. Evaluating insurance carriers, pools, and third party administrators
 - 1. Financial stability

2. Insurance rating services
 3. Reinsurance
 4. Exclusions
- I. Test

RMG 303: Procedures and Techniques of Risk Management Safety/Loss Control

(Same as SAF 303)

- A. Evaluation of loss control/safety needs
- B. Organization and administration of a loss control/safety program
- C. Evaluation of insurance carriers and third-party administrators
- D. Safety for instructional areas
- E. Vehicle loss control
- F. Disaster planning/fire protection
- G. Test

RMG 304: Workers' Compensation and Texas School Districts

- A. Basics of law
 1. Options of school district
 2. What is/is not covered
 3. Networks overview
 4. Time lines and fines
 5. Other (construction contracts, independent contractors)
- B. Structure of Texas Workers' Compensation Commission
 1. Organization
 2. Ombudsman
 3. BRC-CCH-Appeal Panel
 4. Loss control
 5. Medical dispute process
 6. Fines/enforcement mechanism
- C. Types of financing mechanism-advantages/disadvantages
 1. Fully insured plans
 2. Pools
 3. Self-funded
 4. Excess insurance
- D. Purchasing coverage and services
 1. Bid specifications for coverage
 2. Bid specifications for third party administrators
 3. Selecting a third party administrator or insurance
 4. Networks
 5. Miscellaneous services
 - a. Attorneys
 - b. Medical auditors
 - c. Case managers
 - d. Investigators
 - e. Provider services
 - f. Claims adjuster
- E. Claims management

1. Investigating injuries
 2. Subrogation
 3. Fraud
 4. Recordkeeping and audits
 5. Return to work programs
 6. Leave of absence administration
- F. Test

RMG 305: Employee Health Insurance

- A. Basic requirements of state insurance law
- B. Plan design
 1. Coverage and coverage limits
 2. Exclusions
 3. Deductibles, out of pocket maximums
 4. Pre-existing exclusions or limitations
 5. Multiple option plans
 6. Dental plans
 7. Prescription programs
 8. Mental health provisions
 9. Retirees
- C. Provider arrangements
 1. Health maintenance organizations
 2. Preferred provider organizations
 3. Exclusive provider organizations
 4. Point of service
- D. Basics of claims management
 1. Cost containment techniques
 - a. Second opinions
 - b. Bill auditing
 2. Utilization reviews
 - a. Pre-admission
 - b. Discharge planning
 - c. Medical case management
 3. Coordination of benefits
- E. Subrogation
- F. Financing mechanisms
 1. Fully-insured plans
 2. Pools
 3. Self-funding
 4. Stop-loss insurance-specific and aggregate
- G. Purchasing coverage and services
 1. Bid specifications for coverage (fully insured)
 2. Bid specifications for third party administrators
 3. Bid specifications for stop-loss insurance
- H. Wellness programs
- I. Employee assistance programs
- J. COBRA Guidelines
- K. Family Medical Leave Act Requirements in health insurance

L. Test

RMG 306: Managing Risk in Public School Retirement Plans

- A. Public School Retirement Plan Comparison
- B. Common Retirement Plan Terms and Conditions
- C. IRS Enforcement and Correction
- D. Identifying Risk
- E. Records Retention and Maintenance
- F. General Plan Design
- G. 403(b) Plan Design
- H. Plan Design 457(b)
- I. FICA Code 3121
- J. Selecting a Qualified TPA
- K. E&O Vendor Policies and Board Paid Risk Insurance
- L. Plan Continuous Oversight
- M. Review IRS 403(b) /457(b) Checklist
- N. Test

RMG 402: The Project (optional)

The title and description of the project must be approved by the Risk Management Review Panel. Refer to Project Guidelines and Requirements in Section II.

M. Safe Schools Curriculum

SAF 101: Building a Framework

- A. Providing a safe environment
- B. Strategies for mitigation, preparedness, response and recovery
- C. Emergency management
- D. Emergency evacuations, training and drills
- E. Training - who, what, where, when and how
- F. Test

SAF 102: Emergency Management Plan Development

- A. Legislative requirements
- B. Plan overview
 - 1. Incident command system
 - 2. Steps of emergency management
- C. Format for an emergency plan
 - 1. Questions to be answered
 - 2. Establishing the team
 - 3. Communications plan
 - a. internal
 - b. external
 - c. emergency notification
 - 4. Training
 - 5. Provisions for special populations
- D. District-specific emergency guidelines
- E. Campus plans
- F. Board policies and administrative guidance
- G. Test

SAF 201: Safety and Security Management of School Facilities

- A. Departmental roles in emergency management
- B. Relevant safety codes
- C. Systems and procedures to enhance safety and security
- D. Management strategies
 - 1. Texas Hazard Communication Act (HAZMAT)
 - 2. Indoor air quality
 - 3. Integrated pest management (IPM)
 - 4. AHERA
 - 5. Building design
- E. Test

SAF 202: Integrated School Security Strategies and Tactics

THIS COURSE IS NO LONGER OFFERED

SAF 203: School-Centered Emergency Management

- A. Working with other entities
- B. Emergency use of district property
- C. Continuity of operations
- D. Comprehensive after-action review procedures
- E. Documentation and forms
- F. Test

SAF204: Mandated Safety & Security Audits

- A. State and federal authority
- B. Assembling the audit team
- C. Using audit tools to guide the process
- D. Establishing audit timeline and executing the steps
- E. Collecting and analyzing the data
- F. Writing and presenting the findings
- G. Using data to affect positive change
- H. Test

SAF 301: Administration of District Safety and Security Programs

- A. Development of risk assessment protocols
- B. Security and safety tactics and planning
- C. Emergency management strategies (SB11)
 - 1. Mitigation
 - 2. Preparedness
 - 3. Response
 - 4. Recovery
- D. Compliance
 - 1. Board policies and administrative guidance
 - 2. Facility assessments and safety audits
 - 3. Building renovations and new construction
- E. Training
- F. Mutual aid agreements
- G. Test

SAF 302: National Incident Management System for Schools (NIMS)

- A. National incident response system
- B. Crisis planning for schools
- C. Command and management under NIMS
- D. Preparedness
- E. Resource management and communication
- F. Test

SAF303: Procedures and Techniques of Risk Management Safety/Loss Control

(Same as Risk Management 303)

- A. Evaluation of loss control/safety needs
- B. Organization and administration of a loss control/safety program
- C. Evaluation of insurance carriers and third-party administrators
- D. Safety for instructional areas
- E. Vehicle loss control
- F. Disaster planning/fire protection
- G. Test

SAF 402: The Project (optional)

The title and description of the project must be approved by the Safe Schools Review Panel. Refer to Project Guidelines and Requirements in Section II.

N. School Nutrition Curriculum

SNC101: Introduction to School Nutrition

- A. Legal basis-federal and state regulations
- B. Finance provisions
- C. District-operated programs
 - 1. Forms of organizations
 - a. Decentralization
 - b. Centralization
 - c. Satellite programs
 - d. Automation
 - e. Efficiency foods
 - 2. Administration
 - 3. Operation
 - 4. Personnel management
- D. Contracted food services
- E. Systems and cost analysis
- F. Budget and finance
- G. Accounting and recordkeeping
- H. Innovative programs
- I. Purchasing and inventory control
- J. Policies, rules, regulations and procedures
- K. Menus, prices, and portion control
- L. Staffing, supervision, and in-service training
- M. Test

SNC 102: Day-to-Day Operations

This class is being developed.

SNC 104: School Nutrition Accounting

- A. Fund types
- B. Inventory accounting
- C. Accounting issues
 - 1. Fund codes
 - 2. Basis of accounting
 - 3. Measurement focus
 - 4. Budget requirements
 - 5. Capital assets and depreciation
 - 6. Long-term debt
 - 7. Profit and loss measurement
 - 8. Recognition of federal assistance
 - 9. Recognition of revenue
 - 10. Fund balance
- D. Account code structure
- E. How free and reduced lunch figures into state revenue for instruction
- F. Inventory Systems
- G. Test

SNC 201: School Nutrition Purchasing and Specification Writing

- A. Quality characteristics of various purchase forms of food
- B. Receiving and inspection of food and supplies
- C. Food storage procedures
- D. Resource and energy conservation
- E. Ethical purchasing practices and the use of purchasing references
- F. Food purchase specifications
- G. Purchasing and inventory control
- H. Test

SNC 202: School Nutrition Receiving, Storage and Distribution

This class is no longer offered.

SNC 203: Nutrition Awareness

- A. Dietary Guidelines
 - 1. Food guide pyramid
 - 2. Food guide pyramid for young children
 - 3. Vitamins and minerals in the food guide pyramid
 - 4. Cultural awareness of pyramids
 - 5. Food diary
 - 6. Consumption of food servings
- B. Nutrition fact sheets
- C. Healthy menus and habits for adults and families
- D. Texas Dept. of Agriculture –current resources available
- E. Texas public school nutrition policy overview
- F. Wellness policy/programs
- G. Test

SNC202: Implementation of Required School Nutrition Programs

This course is no longer offered

SNC205: Implementation of HACCP (Hazard analysis critical control points) Principles

- A. District warehouse advantages
- B. Receiving and storing properly
- C. Inventory calendar
- D. Equipment for handling frozen foods
- E. Walk-in freezer/refrigerator
- F. Warehouse staff and distribution
- G. HACCP overview
- H. Developing HACCP plans
- I. Test

SNC301: School Nutrition Financial Management

- A. Controlling and analyzing income and expenses
- B. Using commodities to control costs
- C. Budgeting and finance
- D. Productivity and labor cost

- E. Recordkeeping and accounting
- F. Security assets
- G. Innovative programs
- H. Loss control
- I. Test

SNC 302: School Nutrition Personnel Management

- A. Recruitment
- B. Selection, probation, and placement
- C. Job descriptions and work schedules
- D. Training, job performance, remediation-documentation
- E. Change in status
 - 1. Transfers
 - 2. Termination of service
- F. Policies, rules, regulations, and procedures
- G. Staffing, supervision, and in-service training
- H. Emergency training
- I. Test

SNC303: School Nutrition Design & Equipment

- A. Overview
- B. Space guidelines
- C. Equipment and technical guidelines
- D. Equipment specifications – Modular v. Stationary
- E. Renovations and additions
- F. New construction
- G. Working with architects,
- H. Bond packages
- I. Test

SNC304: USDA Commodity Awareness

- A. Eligibility and application
- B. Types of commodities
- C. Commodity processing
- D. Pass-through/net-off invoice
- E. Fee for service
- F. Commodity co-ops
- G. Processor link/ K-12
- H. Cash-in-lieu of commodities
- I. Test

SNC 305: Maximizing School Nutrition Dollars

- A. Identify the major CNP revenue sources
- B. List methods and available programs to increase revenue
- C. Maximize commodity usage
- D. List marketing ideas to increase cash sales
- E. Monitor effects of changes in participation

- F. Understand key concepts in balancing revenue with expenditures
- G. List ways to reduce expenditures if revenue falls short in:
 - 1. Labor
 - 2. Food
 - 3. Equipment
 - 4. Service ware
 - 5. Paper
 - 6. Indirect costs
- H. Demonstrate understanding of the value of inventory control.
- I. List concepts important in marketing to young customers.
- J. Review basic concepts of Texas Department of Agriculture Nutrition Policy.
- K. Discuss the value of computerized point-of-sale systems.
- L. List tools commonly used for financial accountability in CNP programs.
- M. Test

SNC 402: The Project (optional)

The title and description of the project must be approved by the School Nutrition Review Panel. Refer to Project Guidelines and Requirements in Section II.

O. Instructional Materials Curriculum

TXT101: Overview of Textbook Management

(Same as DIS 104)

- A. Cover the complete annual cycle of textbook management
- B. Review TEA requirements regarding sampling and selection of new books
- C. Determining allocation
- D. Completing the TEA report
- E. Recommendations for receiving, processing and distribution for schools with and without loading docks
- F. Money-saving tips for replacing books
- G. Information on decreasing textbook losses
- H. Test

TXT 102: Textbook Management Procedures

- A. Textbook selection process
- B. Fiscal management
- C. District-level procedures
- D. Campus-level procedures
- E. Test

TXT 201: Implementation of Textbook Administration

- A. Creating a chain of responsibility
- B. Inspiring successful textbook managers
- C. Establish a procedures manual
- D. Create consistency
- E. Documentation
- F. Handling & preventing loss
- G. Lean on your friends
- H. Handling the unexpected
- I. Planning for the future
- J. Test

TXT 202: Warehouse Shipping/Receiving

(Same as DIS 202)

- A. Receiving operations
- B. Storage functions
- C. Shipping operations
- D. Developing schedules and daily routines
- E. Warehouse-keeping functions
- F. Standards
- G. Material handling
- H. Test

TXT 301: Managing the Curriculum Change Process

- A. Connection between textbook department and other departments when creating new course curriculum
- B. Textbook department involvement during the exploring and planning stages
- C. How and where to obtain textbooks once new curriculum is approved
- D. Researching textbooks
- E. Options for acquiring new textbooks
- F. Communication between textbook department and curriculum department
- G. Test

TXT 402: The Project (optional)

The title and description of the project must be approved by the Textbooks Review Panel. Refer to Project Guidelines and Requirements in Section II.

P. Transportation Curriculum

TRN101: Introduction to Transportation

- A. Introduction of duties of transportation director
- B. Rules and regulations of Texas Education Agency
- C. State reports
- D. School bus and tire purchasing procedures
- E. Bus driver requirements
- F. Test

TRN 102: Student Safety Management

- A. Student management plan
- B. Driver training
- C. Safety equipment
- D. Classroom training
- E. Student conduct and safety
- F. Evaluation of program
- G. Test

TRN 201: Routing and Scheduling

- A. Development of bus routes
- B. Use of computer routing
- C. Bus routing scheduling
- D. Extracurricular scheduling
- E. Test

TRN 202: Bus Inspection and Maintenance

- A. Development of preventive maintenance schedules
- B. Bus replacement and recycling schedules
- C. Long range planning and equipment replacement
- D. Bus equipment standards and specifications
- E. Test

TRN 205: Transporting Special Needs Students

- A. Driver training
- B. IEP
- C. Parent interaction
- D. State and national guidelines
- E. Special needs equipment
- F. Test

TRN 301: Personnel Management

- A. Staff selection
- B. Staff training (probation period)
- C. Supervision
- D. Evaluation
- E. Test

TRN 305: Evaluation of Transportation

- A. Evaluate policies and procedures for operating a school transportation program
- B. Review of a module on evaluation of transportation program
- C. Test

TRN 306: Preparation of State Reports and Department Budgeting

- A. Route services report
- B. School transportation operation report
- C. Hazardous transportation funding
- D. Annual updates
- E. Transportation department budgeting
 - 1. Account codes
 - 2. Assess needs
 - 3. Manage funds
 - 4. Protect investment
- F. Test

TRN 309: Effective and Efficient Transportation

- A. Analyzing transportation programs using Baldrige management techniques
- B. Best practices for your district
- C. Route design for safety and efficiency
- D. Techniques for improving driver morale
- E. Evaluate transportation program and determine baselines for continuous improvement
- F. Use data to monitor and improve daily operations
- G. Productivity timeline tips
- H. Test

TRN 402: The Project (optional)

The title and description of the project must be approved by the Transportation Review Panel. Refer to Project Guidelines and Requirements in Section II.

TASBO Online Courses

TASBO's online education courses count towards certification credit, and also provide 6 hours of continuing education credit. All course materials, including the exam, are provided online. Registration information is available on the training page of TASBO's website (www.tasbo.org) or contact the TASBO Professional Development Department for more information.