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SECTION I: OVERVIEW

Purpose
The Texas Association of School Business Officials has developed a non-discriminatory, voluntary program of professional certification and continuing education to provide recognized standards of professional competence and educate its diverse constituency in professional business and operations practices. This program was especially created for school business administrators, officials, and specialists in the state of Texas.

Professional Certification Standing Committee
The goals of the TASBO Certification Committee are:
• To provide training in all areas identified in the Components and Competencies for School Business and Support Services (see Appendix E).
• To assure that the TASBO program continues to be the standard for Texas school finance and operations staff.
• To assure that the TASBO program is accessible through multiple methods of delivery.

Per TASBO Board Policy 1612, the mission of the Professional Certification Standing Committee (Certification Committee) is to serve as the advisory group to the TASBO Board of Directors regarding all matters of certification.

Responsibilities: In relation to that mission, the Professional Certification Committee is responsible for the following:
1. Develop and maintain a strong, flexible and meaningful certification program for the TASBO membership.
2. Prepare and conduct in-service training and education for the TASBO membership about the TASBO Certification Program.
3. Conduct research sponsored by the TASBO Board and Executive Director in the area of Certification Programs
4. Prepare and submit for possible publication, feature articles and other editorial material about certification for TASBO publications.
5. Identify the needs and provide curriculum and training for TASBO Management courses.
6. Maintain Certification Program rules, regulations and procedures that will promote and maintain valid TASBO Certification throughout the TASBO organization and the State of Texas.

The TASBO Certification Committee shall gather pertinent research data from the field and disseminate it to the TASBO membership and develop instruments to be used as models for analyzing and improving school district business practices through certification of its members.

Membership: The Committee will be composed of nine (9) members to be appointed by the Board of Directors. New appointments to the committee will be determined through a review of applications. The Board will appoint three members each fall prior to the Annual Conference. The terms of committee members will begin and end at the committee meeting held in
conjunction with the next Annual Conference. Committee members whose terms are expiring at this time will participate in the meeting.

Terms: Members will serve 3-year terms with three members completing terms each year. Members may be appointed for only two complete 3-year terms. Appointment as a member to fill a portion of a 3-year term will not be counted as part of the term limitation. The TASBO Board of Directors has the authority to remove or replace Committee members at any time. Members of the TASBO Board of Directors are not allowed to serve as members or alternates.

Committee Leadership: The TASBO Certification Committee shall have several leaders. Their responsibilities are as follows:

Committee Chair (to be appointed by the Board of Directors) shall be responsible for:

1. Working with TASBO staff to plan the meetings and the methods by which the objectives of the committee will be accomplished.
2. Exercising aggressive leadership by stimulating thinking, conducting discussions, and keeping the meetings on track.
3. Maintaining records and information, including meeting minutes and reports to the Board, regarding the committee’s progress.
4. Bringing new ideas to the committee to promote its goals and maintain its leadership role in TASBO.
5. Keeping in touch with the membership to promote attendance at regular meetings as well as encouraging new ideas and member involvement.

Vice Committee Chair (elected by the committee members at the annual conference or appointed by the Board of Directors) shall be responsible for:

1. Working with the TASBO Headquarters staff on developing and maintaining a list of available and qualified instructors to teach the TASBO Management curriculum required for certification.
2. Working with sub-committees as required to develop TASBO Certification curriculum requirements and content.
3. Assuming the duties of Chair in his or her absence.

Secretary (elected by the committee members at the annual conference or appointed by the Board of Directors) shall be responsible for:

1. Recording and keep accurate records of all TASBO Certification Committee Meetings and events.
2. Reporting same to the Chair, Vice Chair, and TASBO Staff for review and correction as needed prior to submission.
3. Assisting Certification Committee Chair and Vice Chair with maintaining accurate records of all TASBO Certification Committee Meetings and events.
These officers will serve two 1-year terms; and there will not be an automatic rotation schedule. The Chair will remain eligible for a longer term, but may not extend beyond the expiration date for their term as a committee member. In the event of a vacancy, the committee will elect a replacement or the Board of Directors will name a replacement.

Qualifications: Members of the Committee must have earned TASBO certification or have previous experience as a member of the TASBO Board of Directors, with 3 years as an active or life member and 2 years active service on a research committee. All officers and committee members must be Active or Life members in good standing of the state organization. All members will be required to sign a Standing Committee Code of Conduct.

Meetings: At least two meetings will be held each year, with additional meetings scheduled as needed.

Attendance: The Board may consider replacing a committee member if that member misses two consecutive meetings.

Liaisons to the Committee: The Research Committee Chairs or their designees will serve as Advisory Liaisons to the Professional Certification Committee. These Advisory Liaisons will meet with the Professional Certification Committee at the meeting held in conjunction with the Annual Conference. In addition, the Board President shall appoint two Board members annually to serve as liaisons to the committee.

**Governance of the Program**

The TASBO Board of Directors shall adopt all policies, rules, and regulations governing the administration of the certification program. Policies, rules, and regulations for action should come recommended to the Board from the Certification Committee and the Executive Director. Policies, rules, and regulations governing the certification program will be made available through the TASBO website.

**Eligibility Requirements**

Eligibility requirements are outlined in Section II of this manual. Upon final approval of the application, all individuals who meet the standards and qualifications for certification established by the TASBO Board of Directors shall be certified for a three-year period. Recipients must meet the continuing education requirements, as established by the Board of Directors and described later in this section, to renew their certification for subsequent three-year periods.

**Procedures**

- All applications for certification will be reviewed and evaluated by the TASBO Credentialing Specialist. The Credentialing Specialist will approve or deny the applicants based on information received from the certification application and data in the transcript file of the individual.
- The Credentialing Specialist may request additional information as is deemed necessary to verify application data. Failure to provide information as requested by the Credentialing
Specialist shall constitute grounds for denial of the application. An application for certification may be disapproved if TASBO staff is unable to satisfactorily verify any material representation contained in the application.

- Information provided as part of the application for professional certification shall be used solely for the purpose of evaluating the qualifications of the applicant for professional certification.
- Certified appointees may hold only one TASBO certificate designation at a time; this designation will be the highest they have earned.
- The Registered Texas School Business Administrator (RTSBA™) supersedes the Certified Texas School Business Administrator (CTSBA).
- An applicant for the Certified Texas School Business Specialist (CTSBS™) or the Certified Texas School Business Official (CTSBO™) designation must indicate the area of specialization(s) by taking the required courses in those areas when working for certification.
- TASBO maintains a “no testing out” policy. To receive certification credit, an individual must attend the course in its entirety and take and pass the test given at the end of the course. The test must be taken at the time it is administered to the class participants.
- Individuals completing online courses will be given a final exam when all lessons have been satisfactorily completed. Credit will be awarded after successful completion of final exam and online project (if applicable).
- Questions about the Certification Program shall be addressed to the Director of Certification or the Credentialing Specialist.

Denial and Appeal Process
In the event a certification application is incomplete and placed on hold, or denied, the applicant will be notified in writing of that determination by the Credentialing Specialist.

The applicant shall have the right to appeal the decision of the Credentialing Specialist by written notice to the Executive Director. If the appeal is denied, the Executive Director shall notify the applicant in writing. The applicant shall then have the right to appeal the decision to the Certification Committee. The appeal must be received by the chair of the Certification Committee within 30 days from the date of receipt of the Executive Director’s written denial notice. All documentation supporting the appeal must be received by the committee chair within 60 days of receipt of the Executive Director’s written notice of denial.

Continuing Education Requirements
All certificates shall be valid for three years from the date granted and will be renewed for subsequent three-year periods upon completion of continuing education requirements.

The purpose of the continuing education requirement is to verify that certificate holders remain knowledgeable and current in their field of expertise. Certified individuals may apply for continuing education credit hours offered by an approved organization (see Appendix A).

- Certificate holders of the CTSBS™, CTSBO™, CTSBA, and RTSBA™ must receive at least 60 clock hours of continuing education every three years. This is to be completed by the end
of the three-year period from the date of issuance or renewal to maintain the current certification.

- For renewal periods prior to September 1, 2015, 12 of the required hours must be earned through TASBO or programs sponsored by TASBO affiliates. After September 1, 2015, CTSBS\textsuperscript{cm}, CTSBO\textsuperscript{cm}, CTSBA, and RTSBA\textsuperscript{cm} renewals, in addition to new certifications, must earn half of the required hours through TASBO or programs sponsored by TASBO affiliates.

- Certificate holders who are Life Members and not currently employed by a school district or consulting for a school district (including governmental entities or other affiliated organizations), are not required to complete continuing education hours to maintain certification. Life members employed by a school district or consulting for a school district (including governmental entities or other affiliate organizations) must obtain a minimum of 12 hours annually.

- A retired, non-Life member holding a certificate who wishes to keep his/her certification must complete the required continuing education hours just as an active member would.

- Certificate holders must file their clock hours of continuing education credits in writing to TASBO staff or through TASBO’s electronic reporting system.

- After attendance at a training offered by an approved organization, individuals are to complete a Continuing Education Attendance Report (blank form is available in Appendix D) and submit via TASBO’s electronic system. Individuals must keep a copy of the attendance record for a period of three years. A list of organizations currently approved for continuing education credit is found in Appendix A and on the TASBO website.

- Instructors of TASBO education courses may receive certification credit and/or continuing education hours, once annually (TASBO’s fiscal year) per course taught. Instructors should inform TASBO staff if they want either of these credits.

- Publication of an original article in the TASBO Report earns 3 hours of CEUs.

- The end-of-course test is not required if the course is taken only for continuing education hours.

**Prior Course Work**

Non-members who have taken courses and passed the required tests in the two-year period prior to May 1, 2005, may receive certification credit. Requests to receive this credit should be sent in writing to the TASBO Credentialing Specialist.

**Substitute Course Credits**

Substitute courses are those taken in lieu of specific TASBO courses. These substitutes must be approved, in advance, by the appropriate research committee and the TASBO Certification Committee. No more than two substitute or equivalent courses will be allowed for certification. See Appendix B for a list of currently approved substitute courses.

**Equivalent Course Credits**

The TASBO Certification Committee, upon petition from another school professional organization, will review the requirements of that organization for certification to determine which, if any, course equivalencies may be granted toward TASBO certification for that professional organization’s certified members. No more than two substitute or equivalent...
courses will be allowed for certification. See Appendix B for a list of currently approved equivalent courses.

**Revocation of Certification**
A professional certificate may be revoked by the TASBO Executive Director, based on recommendation of the TASBO certification staff, for failure to meet requirements of continuing education. This revocation can occur only after the individual has been notified in writing (includes email) that continuing education requirements have not been met, and has been given a three-month grace period to turn in documentation of completion. Names of members whose certificates have been revoked for this reason will be provided to the Board of Directors at the next scheduled board meeting.

A professional certificate may be revoked by the TASBO Board of Directors for violation of the TASBO Code of Ethics or for falsification or misrepresentation of information relied on when granting the certificate. See Appendix C for the Code of Ethics.

**Reinstatement of Certification**
A professional certificate revoked for failure to meet continuing education requirements may be reinstated if all of the following conditions are met: 1) a new application is submitted to TASBO, 2) the application fee is paid again, 3) the new application is submitted within two years of the date the certification was revoked, and 4) all delinquent continuing education hours are completed and documentation is submitted to TASBO. The individual is required to submit the remaining number of hours for the maintenance period between the date of revocation and the date application is made for reinstatement. The new maintenance period begins the date reinstatement is approved, and upon submission of the reinstatement application, supporting documents, and required fee.

**Violation of TASBO Code of Ethics – Grounds for Revocation**
- Any individual may file a complaint with the Board of Directors of the Texas Association of School Business Officials against any certified individual who has allegedly violated the Code of Ethics.
- The TASBO Board of Directors or staff may open a complaint on its own initiative.
- A certified individual shall self-report in writing to the Board the occurrence of any of the following events within 30 days of the date certificate holder has knowledge of these events:
  1) the conviction or imposition of deferred adjudication of the certificate holder of any of the following:
     (A) a felony;
     (B) a crime of moral turpitude;
  2) As used in this section, a conviction includes the initial plea, verdict, or finding of guilt, plea of no contest, or pronouncement of sentence by a trial court even though that conviction may not be final or sentence may not be actually imposed until all appeals are exhausted.
- TASBO will send written notification to the certified individual that a complaint file has been opened and will ask the certified individual to respond to the complaint.
• The Board of Directors will determine whether or not to have a hearing regarding the complaint.
• If a hearing is held, the Board of Directors will notify the parties involved of the time and place of the hearing, which will be private and not open to the public. Notices shall give all parties a reasonable length of time to prepare.
• Based upon the evidence and facts presented to the Board of Directors for the hearing and based upon the seriousness and degree of the violation, the Board of Directors will decide upon the disposition of the complaint. A revocation of certification by the Board shall be final and subject to appeal.

Application Fees
Fees will be set by the Board of Directors. The current fee structure is shown below.

<table>
<thead>
<tr>
<th></th>
<th>RTSBA&lt;sup&gt;cm&lt;/sup&gt;</th>
<th>CTSBO&lt;sup&gt;cm&lt;/sup&gt;</th>
<th>CTSBS&lt;sup&gt;cm&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Rate*</td>
<td>$100</td>
<td>$75</td>
<td>$60</td>
</tr>
<tr>
<td>Non-Member Rate</td>
<td>$235</td>
<td>$210</td>
<td>$195</td>
</tr>
</tbody>
</table>

(* Member Rates include all TASBO Active, Associate, Retired and Student Members)
SECTION II: REQUIREMENTS FOR CERTIFICATION

General Requirements
The following requirements are common to all levels of TASBO certification.
1. As of May 1, 2005, TASBO membership is no longer required to become TASBO certified.
2. An individual must be currently working in a public or non-public school or qualifying organization (such as Texas Regional Education Service Centers or the Texas Education Agency) at the time application for certification is filed and approved.
3. At the time of application for certification, the applicant must submit a letter of recommendation from the applicant’s supervisor regarding the applicant’s:
   a. Integrity,
   b. Character,
   c. Ethical Behavior, and
   d. Efficiency and competency on the job.
4. The applicant must complete the required coursework track.
5. The applicant must submit a completed Certification Application on forms provided by TASBO, including a signed Code of Ethics and supporting documents.
6. The applicant must ensure that substitute and/or equivalent courses are approved, in advance, by the appropriate research committee and the TASBO Certification Committee; approved courses may be found in Appendix B. (No more than two substitute and/or equivalent courses will be allowed for all certification levels combined.)
7. Each level of certification requires a minimum number of courses that must be taken in a classroom setting. Certification may not be earned through online courses only.
8. Course credit earned under any certification level may be credited toward any higher certification level, where applicable. (i.e., an individual does not have to take a course twice).
9. As of January 1, 2007, MGT307: Business Ethics is a required course for all levels of TASBO certification.

Areas of Specialization
Education courses are based on these areas of specialization: Accounting, Distribution and Inventory, Information Technology, Information Technology Management, Internal Auditing, Maintenance and Operations, Payroll, PEIMS, Personnel, Purchasing and Supply Management, Risk Management, Safety and Security, School Nutrition, Instructional Materials, and Transportation. (Management courses are also provided but are not considered an area of specialization.)
School Business Experience
School business experience is gained when an individual’s primary job responsibility is school business and/or operations. The following is to be considered as a guide for determining an individual’s school business experience:

- The individual’s job must relate to the Components and Competencies (see Appendix E).
- A significant amount of the individual’s time, more than 50%, is spent in Texas school business and/or operations areas of responsibility.
- Any questions or clarifications related to the definition of school business experience should be submitted by the Credentialing Specialist or Deputy Executive Director for review and action by the Certification Committee if necessary.

Requirements for Certified Texas School Business Specialist®
(CTSBS)
Applicant Must:
1. Meet all general requirements for certification.
2. Have two years of school business and/or operations experience.
3. Take a minimum of 2 TASBO certification courses in a classroom setting.

Course Requirements:
1. A minimum of seven courses must be completed.
2. Four courses must be taken from one area of specialization in the TASBO curriculum. (Management is not an area of specialization.)
3. The remaining three courses must include MGT307: Business Ethics and any additional two courses from the TASBO curriculum.

Requirements for Certified Texas School Business Official®
(CTSBO)
Applicant Must:
1. Meet all general requirements for certification.
2. Have three years of school business and/or operations experience, with at least two consecutive years in one district or qualifying organization.
3. Take a minimum of 4 TASBO certification courses in a classroom setting.

Course Requirements:
1. A minimum of ten courses must be completed.
2. A minimum of three courses must be taken from each of three different areas of specialization in the TASBO curriculum. (Management is not an area of specialization.)
3. MGT307: Business Ethics must be completed.
Requirements for Registered Texas School Business Administrator® (RTSBA)

Applicant Must:

1. Meet all general requirements for certification.
2. Have at least a bachelor’s degree from an accredited college or university.
3. Have five years of school business and/or operations experience, with at least three consecutive years in one district or qualifying organization.
4. Take a minimum of 6 TASBO certification courses in a classroom setting.

Course Requirements:

1. A minimum of fifteen courses must be completed.
2. Eight specific courses must be taken, including:
   a. Management 301: Functions and Duties of School Business Administrator
   b. Management 303: Approaches to Management and Leadership
   c. Management 306: Board Policies and Administrative Procedures
   d. Management 307: Business Ethics
   e. Management 308: Effective Communications OR MGT320 Effective Advocacy – Navigating the Political Process
   f. Management 309: Business Administration and the Law
   g. Management 310: Long-Range Planning OR MGT321 Managing for Performance Excellence
3. The remaining seven other courses must be taken from any of the TASBO curriculum.

Certified Texas School Business Administrator (CTSBA) Certification

Effective January 1, 2000, the CTSBA (Certified Texas School Business Administrator) is no longer available; however, those individuals who have already earned the CTSBA may continue to use that designation as long as they maintain their continuing education requirements. If a holder of the CTSBA earns the RTSBA™, the RTSBA™ will supersede.
SECTION III: CERTIFICATION PROGRAM CURRICULUM

Accounting and Finance Curriculum

ACT 100: Introduction to Accounting
A. The role of the district business office
C. Double-entry accounting
D. Basic accounting equation
E. Account codes
F. Introduction to encumbrances
G. Preparing fund financial statements
H. Budgets (transfers vs. amendments)
I. Cash management responsibilities
J. Purpose and need for internal controls

ACT 100c: Introduction to Accounting for Charter Schools
A. Financial Accountability System Resource Guide (FASRG)
B. The role of the charter school business office
C. Double-entry accounting
D. Basic accounting equation
E. Account codes
F. Introduction to encumbrances
G. Preparing non-profit financial statements
H. Budgets (transfers vs. amendments)
I. Cash management responsibilities
J. Purpose and need for internal controls

ACT 101A: State Aid Calculation Part I
A. The components of the current state funding system
B. The judicial and legislative history of the state funding system
C. The tier structure of the current state funding system

ACT 101B: State Aid Calculation Part II
(ACT 101A is a prerequisite for this course)
A. The components of the current state funding system
B. The tier structure of the current state funding system
C. Wealth Equalization
D. Facilities Assistance
E. Tax Issues
ACT 103: Activity Fund Accounting
A. Legal requirements related to managing activity funds
B. School district responsibilities concerning the management of activity funds
C. Sources of funds which may be accounted for in an activity fund
D. Appropriate expenditures for Campus and Student Activity Funds
E. Accounting procedures used in activity funds
F. State laws governing sales tax collection, reporting, and remittance
G. Best practices in managing activity funds

ACT 104: Budget and Financial Planning
A. The budget development process
B. Legal requirements related to developing a budget
C. Approaches to preparing a budget
D. Roles and responsibilities assigned to various parties in the budget development process
E. How to estimate revenues and expenditures
F. Preparing multi-year projections
G. Differences in budgeting for grants and construction programs
H. How a fund balance is used and/or affected in the budgeting process

ACT 105A: Basic Governmental Accounting Part I
(Suggested for those without an accounting background)
A. Definition of governmental accounting
B. Principles of debits and credits
C. How to record bookkeeping entries
D. Purpose of the general ledger
E. How to make correcting entries
F. Preparing a Statement of Revenues, Expenditures, and Changes in Fund Balance
G. Understanding the balance sheet
H. Closing a set of books
I. Reviewing the accounting cycle
J. Understanding the encumbrance system
K. Budgetary process and budgetary accounts
L. Analyzing budgetary variances and basic budgetary practices

ACT 105B: Basic Governmental Accounting Part II
(ACT 105A is a prerequisite for this course)
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

ACT 106: Financial Coding for Texas Schools
A. Texas School District business concepts
B. Financial Account Codes for Texas Schools
D. The importance and impact of proper account coding
E. How the coding structure allows uniform recording of funds passed from state and federal government sources
F. How resources and reference materials evolve and change as the business environment and requirements for public information change
G. The budget process and PEIMS reporting

ACT 106c: Financial Coding for Texas Charter Schools
A. The purpose and importance of account coding
B. The users of charter budget and financial reports
C. Differences between charter school account coding and independent school districts
D. The general reporting requirements and its relationship to accurate account coding
E. Account code structure required by the Texas Education Agency
F. TEA Financial Accountability Resource Guide (FASRG)
G. The Special Supplement to Financial Accounting and Reporting Nonprofit Charter School Chart of Accounts
H. PEIMS Data Standards

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
ACT 108: Accounts Payable Processes
A. The role Accounts Payable 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.

ACT 201: Internal Auditing
(Same as AUD 201)
A. Definition of internal auditing
B. Purpose of internal audit function
C. Establishing the internal audit function
D. The audit process
E. What to do if you don’t have an internal auditor
F. Emerging Issues

ACT 202: External Auditing
(Same as AUD 202)
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

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

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

ACT 205A: Intermediate Governmental Accounting Part I
(Suggested for those with an accounting background)
A. Review of governmental accounting definition
B. Accounting differences between private enterprise and school districts
C. Review of governmental accounting principles and policies and bases of governmental accounting
D. Current projects of Governmental Accounting Standards Board (GASB)
E. Budgetary accounting transactions
F. Financial statement elements
G. Accounting policies
H. Introduction to Government-Wide Financial Statements

ACT 205B: Intermediate Governmental Accounting Part II
(\textit{ACT 205A is a prerequisite for this course})
A. District financial statements and reports
B. The selection process for choosing an external audit firm
C. Methods of preparing for a financial audit
D. Methods of determining accountability for the district
E. TEA rating processes
F. The Schools First Report
G. Other accountability measures

ACT 208: Managing Special Revenue and State Programs
A. Different types of awards
B. OMB cost principles
C. When obligations and liquidation of obligations must occur
D. Reporting requirements
E. Fixed assets definition and record keeping requirements
F. Cash management requirements
G. Amending grant budgets
H. MOE requirement
I. The limitations of roll-forward of entitlement funds
J. The indirect cost for foundation school programs

ACT 208c: Managing Charter School State & Federal Funds
A. Different types of awards
B. OMB cost principles
C. When obligations and liquidation of obligations must occur
D. Reporting requirements
E. Fixed assets definition and record keeping requirements
F. Cash management requirements
G. Amending grant budgets
H. MOE requirement
I. The limitations of roll-forward of entitlement funds
J. The indirect cost for foundation school programs
ACT 209: District-wide Risk Assessment
(Same as AUD 209)
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

ACT 210: Operational Auditing
(Same as AUD 210)
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

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

ACT 306: Government-wide Financial Statements and Reporting
A. Key school district financial reporting requirements
B. Management Discussion and Analysis (MD&A)
D. Government-wide financial statements
C. Fund financial statements
E. Budgetary comparisons financial statements
F. Reconciliation exploratory information
G. Conversions of financial transactional information
H. Pension and other post-employment benefit information
I. Accounting policies and notes
J. Statistical section

ACT 314: 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

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
Internal Auditing Curriculum

AUD 201: Internal Auditing
(Same as ACT 201)
A. Definition of internal auditing
B. Purpose of internal audit function
C. Establishing the internal audit function
D. The audit process
E. What to do if you don’t have an internal auditor
F. Emerging Issues

AUD 202: External Auditing
(Same as ACT 202)
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

AUD 209: District-wide Risk Assessment
(Same as ACT 209)
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

AUD 210: Operational Auditing
(Same as ACT 210)
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
AUD 211: Fraud Detection & Investigation
A. What is fraud?
B. What steps can a school district take to detect fraud?
C. What steps can a school district take to prevent fraud?
D. What steps can a school district take to deter fraud?
E. How should a school district investigate fraud?

AUD 212: Auditing without an Auditor
A. What does the auditor do?
B. What types of risk do school districts face?
C. Significance of internal controls
D. Steps to take to strengthen controls
E. What about the external auditor?
F. How to hire an internal auditor

AUD 303: PEIMS Auditing
(Same as PEI303)
A. Student Attendance / PEIMS Audits
B. Objectives for Auditing Student Attendance / PEIMS
C. Utilizing your host system to detail groups or draw statistical samples
D. Risk Assessment for Student Attendance Audits
E. Make your audits a useful tool to the board and management
F. Ongoing monitoring and follow-up on significant results
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

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
DIS 104: Overview of Instructional Materials  
(Same as TXT 101)  
A. Annual cycle of instructional materials  
B. Legal requirements concerning instructional materials  
C. State instructional material selection  
D. Sources involved with instructional material management  
E. Distribution styles of management  
F. Instructional material areas that need to be managed  
G. EMAT – the state inventory system

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

DIS 201: Distribution Personnel Management  
A. Job descriptions and ADA.  
B. Hiring practices/staff selection/dismissals  
C. Employee rights and benefits  
D. Training and development  
E. Counseling  
F. Safety

DIS 202: Warehouse Shipping/Receiving  
(Same as TXT 202)  
A. Shipping and receiving terminology  
B. Distribution and warehouse concepts  
C. Material handling and storage requirements  
D. Receiving operations  
E. Storage operations  
F. Order selection and shipping procedures  
G. Developing schedules and daily routines  
H. Inventory verification requirements and the various processes that can be used to meet requirements  
I. Receiving and shipping standards within Distribution Centers and Warehouses
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

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

DIS 302: Purchasing/Stock Management
(Same as PUR302)
   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
Information Technology Curriculum

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

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

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

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
ITC 205: Introduction to Relational Databases
(A beginning course for those wanting to learn about relational databases.)
A. Creating new databases
B. Creating new tables
C. Modifying and printing table data
D. Finding, sorting, and filtering table data
E. Creating forms
F. Finding, sorting, and filtering form data
G. Modifying forms
H. Creating a simple query
I. Modifying a query
J. Creating reports
K. Modifying a report
L. Copying, renaming, deleting database objects
M. Compacting and repairing a database
N. Importing spreadsheet data and text into an Access table

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

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

**ITC 209: Multi-media Presentation Tools and Development**
A. Creating a basic presentation
B. Adding, editing, and moving text
C. Changing the background of a slide
D. Changing slide order
E. Creating a Themed template
F. Working with different views
G. Applying transitions
H. Inserting and managing graphics and objects
I. Using the Print Options
J. Using Smart Tags
K. Adding media
L. Creating a presentation using the Outline Tab
M. Modifying the Slide Master
N. Using Collaboration tools
O. Creating a Kiosk presentation

**ITC 302: Integrating Microsoft Office Applications**
A. Managing Outlook Data
B. Working with Mailings
C. Access Advanced Topics
D. Working with Web and External Data
E. New Features for Graphics and Images
F. Outlook 2010
G. More Word Topics

**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 (flow charts, 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

ITC 305: Microsoft Project
   A. Defining the project
   B. Defining and modify tasks
   C. Specifying and assigning resources
   D. Tracking progress
   E. Viewing and reporting project status
   F. Managing 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
Information Technology Management

ITM 101: IT Service Operations
A. Student accounting
B. Financial management
C. Technology support and service operations
D. Network infrastructure and integration
E. Facilities

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.

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.

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.

ITM 301: Technology Process Management
A. Information Technology Process Classification Framework for Education
B. Baldrige Education Criteria for Performance Excellence
C. Carnegie Foundation on Educational Improvement’s Principles of Improvement
D. Process tools such as DMAIC, SIPOC, Fishbones, and Root Cause Determination
E. Leadership approaches and tools to build stronger independent and synergistic teams

ITM 304: Managing Technology Results
A. How results are evaluated
B. The challenges and activities required when transitioning to a results-based management system
C. The factors that are vital for a results-based strategy to be successful
D. How organizational alignment affects the ability to support key organization-wide goals
E. How results are used to create and balance value for students and key stakeholders, using the TASBO PEP program model
F. What good reporting of results looks like and the various methods of good reporting
G. TASBO Performance Excellence Program (PEP) results are measured by maturity, gauged by results and the processes that have produced those results
H. Benchmarking and best practices as a means to the best possible way of doing something
I. How best practices are embedded beliefs and behaviors found in high performing organizations
J. How to define key benchmarks in the area of Technology Results
Maintenance & Operations Curriculum

MAO 100: 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

MAO 101: 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 administrating 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

MAO 103: 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

MAO 200 Budget & Financial Planning for Maintenance & Operations
(to be developed)
MAO 201: Planning & Administering School Construction Projects
  A. Texas Educational Agency (TEA) Facility Standards
  B. Components of Educational Facility Specifications
  C. Construction Project Delivery Methods
  D. How to Select the Architect and Builder
  E. Major Steps of Construction Administration
  F. Building Commissioning
  G. Post Construction Administration

MAO 202: 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

MAO 203: 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

MAO 204: Environmental and Regulatory Compliance
  A. HAZCOM and the Right to Know Law
  B. Indoor Air Quality (IAQ)/Indoor Environments
  C. Blood-borne pathogens
  D. Integrated Pest Management
  E. American with Disabilities Act (ADA)
  F. Asbestos awareness training
  G. Lead Regulations
  H. National Fire Protection Association (NFPA)

MAO 301: Emergency Planning and Management
  A. Senate Bill 11
  B. Multi-hazard Emergency Operations Plan
  C. Defining Emergency vs Crisis
  D. Defining Emergency Response vs. Emergency Management
  E. Key Players
F. Multi-Hazard & Incident Command Training
G. Developing a School Emergency Plan

MAO 303: 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
   a. Equal Employment Opportunities
   b. Grievances-civil and criminal
   c. Affirmative action
   d. Discipline and termination
   e. Guidelines to follow
E. Important management aspects
F. Development of operations manual/procedure book

MAO 304: 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

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

MGT 303: Approaches to Leadership & Management
A. Gregorc Style Delineator (for self-analysis and self-observation)
B. Management and leadership qualities and skills
C. Personality types and generational differences
D. Best practices for counseling and motivating employees
E. The concepts of change management and time management.

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

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

MGT 307: Business Ethics
A. Definition of business ethics
B. Sources of ethical values
C. Ethical values versus the law
D. Organizational and/or community ethical standards
E. Types of ethical values
F. How to cope with unethical situations  
G. Ethical guidelines for decision making  
H. Codes of ethics for the workplace/district – combining educational and business ethics  

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  

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  

MGT 310: Long Range Planning  
A. Planning and Needs Assessment  
B. Capital Plans and Communication  
C. Enrollment & Staffing Projections  
D. Modeling Components for Long-Range Planning  
E. Project – Long Range Planning  

MGT 317: Financial Essentials  
(Suggested for those without an accounting background)  
A. Overview  
1. Mission  
2. Goals  
3. Objectives
Management

B. Account coding
C. Employee/independent contractor determination
D. Managing budgets
E. Forecasting, planning, and asset replacement schedules
F. Cost accounting
G. Internal controls
H. Financial reporting
I. Financial information users

MGT 317c: Financial Essentials for Charter Schools
A. Basic Fiscal Requirements
B. Account Coding
C. Employees
D. Managing Budgets
E. Forecasting, Planning & Asset Replacement Schedules
F. Charter FIRST
G. Indirect Costs
H. Internal Controls
I. Financial Reporting
J. Financial Information Users

MGT 318: Advanced Financial Concepts
(Suggested for those with an 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

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. File and forms management and standardization
H. Disaster recovery plan

MGT 320: Effective Advocacy – Navigating the Political Process
A. How to become an effective advocate in the political process
B. Review of various levels of government
C. The overall principles for effective legislative advocacy
D. Understanding your audience for advocacy
E. Policymakers and legislative staff
F. Developing the message using the message formula
G. The best methods for delivering the message
H. How to follow-up on the message

MGT 321: Managing for Performance Excellence
A. The key quality concepts that form the foundation of performance excellence
B. W. Edward’s Deming’s Theory of Profound Knowledge and Fourteen Points as related to education
C. Key management concepts for leading performance excellence
D. The Baldrige Criteria for Performance Excellence (BCPE) Framework as an Integrated Management System
E. The evaluation factors used for assessing an organization against the Baldrige Criteria for Performance Excellence
F. The role of effective change management in leading for performance excellence
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

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

PAY 204: Year-end Reporting Process
A. Planning processes for the calendar year, school year and fiscal year
B. Preparation steps for the Year End Process (understanding the basic calculation in payroll)
C. Reconciliation steps which are required monthly, quarterly and annually
D. Year End Process: understanding the Form W-2 and implementing new tax tables

PAY 205: Leaves and Absences
(Same as PER 205)
A. Legal requirements related to leaves and absences
B. Legal requirements related to the temporary disability leave
C. Legal requirements related to the Family and Medical Leave Act (FMLA)
D. Workers Compensation as it relates to the district’s leave program(s)
E. Federal military leave as required by the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)
F. The difference between mandated state leave programs and local leave programs
G. How to manage leave and absence programs and legal requirements as they relate to the programs
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. TRS Reports/TRAQS reporting system

PAY 301: Employee Benefits Plan
A. Section 403(b) tax sheltered annuities
B. Section 457 Deferred Compensation plans of state and local government
C. Section 125 Cafeteria Plans
D. Social Security and Medicare issues for local-government employees
E. Calculating exclusions amounts for Section 403(b) annuities and annual ceiling amounts for Section 457 plans

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

PAY 304: Fair Labor Standards Act Administration
(Same as PER 304)
A. Legal requirements related to the Fair Labor Standards Act (FLSA)
B. To whom the FLSA applies
C. Minimum wage provisions of the FLSA
D. Overtime provisions of the FLSA
E. Child labor provisions of the FLSA
F. Recordkeeping requirements of the FLSA
G. How to promote and ensure compliance with the FLSA
H. Best practices in complying with the FLSA, including policies, procedures, checklists, and forms
Personnel Curriculum

PER 101: Introduction to Personnel
A. Role of human resources office
B. Staffing components
C. Employment arrangements
D. Employee compensation
E. Employee relations
F. Personnel records management
G. Communication

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

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

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

PER 205: Leaves & Absences
(Same as PAY 205)
A. Legal requirements related to leaves and absences
B. Legal requirements related to the temporary disability leave
C. Legal requirements related to the Family and Medical Leave Act (FMLA)
D. Workers Compensation as it relates to the district’s leave program(s)
E. Federal military leave as required by the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)
F. The difference between mandated state leave programs and local leave programs
G. How to manage leave and absence programs and legal requirements as they relate to the programs

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
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

PER 304: Fair Labor Standards Act Administration
(Same as PAY 304)
A. Legal requirements related to the Fair Labor Standards Act (FLSA)
B. To whom the FLSA applies
C. Minimum wage provisions of the FLSA
D. Overtime provisions of the FLSA
E. Child labor provisions of the FLSA
F. Recordkeeping requirements of the FLSA
G. How to promote and ensure compliance with the FLSA
H. Best practices in complying with the FLSA, including policies, procedures, checklists, and forms

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.
Public Education Information Management Systems (PEIMS) Curriculum

PEI 101: PEIMS Accuracy: Preparation (Student Attendance Accounting Handbook)
   A. Overview
   B. Audit Requirements
   C. General Attendance Requirements
   D. Special Education
   E. Career & Technical Education (CTE)
   F. Bilingual/English as a Second Language
   G. Prekindergarten
   H. Gifted & Talented
   I. Pregnancy Related Services
   J. Nontraditional Schools
   K. Virtual, Remote, and Electronic Instruction

PEI 103A: PEIMS Accuracy: Special Populations and Programs Part I
   A. Student attendance audit queries
   B. Data quality and assurance
   C. Training district staff
   D. Review Sections 4, 5, and 6 of the Student Attendance Accounting Handbook

PEI 103B: PEIMS Accuracy: Special Populations and Programs Part II
   A. Student attendance audit queries
   B. Review Sections 7, 8, 9, 10, 11, 12 and 13 of the Student Attendance Accounting Handbook

PEI 105 PEIMS: Cohorts, Leavers and Accountability
   A. Overview of contributors and stakeholders
   B. Definitions
   C. Data flow from LEA to TEA and beyond
   D. TEA Accountability application
   E. Verification of data
   F. Accountability systems

PEI 107: Navigating TSDS for PEIMS Data Collections
   A. What is Texas Student Data System (TSDS)?
   B. How do I access TSDS?
   C. What user roles do my staff and I need to have?
   D. How do I use the TEDS?
   E. Establishing a Texas Unique ID for students and staff members
   F. The PEIMS data submission process
   G. How do I resolve validation and other edit errors?
H. How do I submit a TIMS ticket?
I. What reports are available at the completion of a data submission?

PEI 108: Transcripts to PEIMS and Beyond
A. What is a transcript
B. Transcript governance
C. Published Academic Achievement Record minimum standards
D. Texas Records Exchange System (TREx)
E. Graduation Plan and Cohorts
F. PEIMS reporting of the transcript data
G. TEA Accountability Application

PEI 109: All About Attendance and Absences
A. Laws and rules governing attendance
B. SAAH responsibilities of various district positions and roles
C. Funding and ADA Codes
D. Types of absences
E. Auditing Processes
F. Attendance / Absences as reported via PEIMS
G. Attendance / Absences are they relate to Accountability
H. Funding
I. Suggestions for Improvement

PEI 110: PEIMS External Applications
A. Texas Education Agency Security Environment (TEASE) and Texas Education Agency Login (TEAL)
B. Person Identification Database (PID) and PID Enrollment Tracking (PET)
C. Unique Identification (UID) through Texas Student Data System (TSDS)
D. Texas Records Exchange (TREx)
E. Texas Education Agency’s Secure Mail (PPG)
F. Texas Certificate of High School Equivalency (TxCHSE)

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. EDIT+ reports
PEI 203: PEIMS Focus Topic: Discipline Details
A. Overview
B. Audit Requirements
C. General Attendance Requirements
D. Special Education
E. Career & Technical Education (CTE)
F. Bilingual/English as a Second Language
G. Prekindergarten
H. Gifted & Talented
I. Pregnancy Related Services
J. Nontraditional Schools

PEI 204: Focus on Finance
A. Understanding PEIMS
B. Required budget and actual date for Submissions 1 & 2
C. PEIMS Data Standards
D. PEIMS Edit +

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 and Student and Staff PID
H. Data quality assurance, audits and compliance issues

PEI 302: PEIMS: The Foundation for Accountability
A. Accountability Umbrella
B. Texas Academic Performance Reports
C. State Accountability system regarding student data
D. Accountability system for Federal Accountability regarding student data
E. The indicators for Performance Based Monitoring (PBM)
F. State Accountability system regarding financial data
G. PEIMS Edit + Reports as they reflect accountability data

AUD 303: PEIMS Auditing
(Same as PEI303)
A. Objectives for Auditing Student Attendance / PEIMS
B. Utilizing your host system to detail groups or draw statistical samples
C. Risk Assessment for Student Attendance Audits
D. Make your audits a useful tool to the board and management
E. Ongoing monitoring and follow-up on significant results

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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

PUR 102: Applications of Purchasing Law
A. Applying the Education Code to school purchasing procedures
B. The legal methods for making school district purchases that exceed state monetary requirements
C. Other state legal resources that control the purchasing function
D. Federal laws and regulations that control purchases for federally funded programs

PUR 103: Purchasing Contracts
A. Law of Agency
B. Contract Identification
C. Contract Selection
D. Uniform Commercial Code
E. Texas Contract Law
F. School District Contracts
G. E-rate Contracting
H. Vendor Contracts
I. Contract Administration

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
PUR 203: The Purchase of Insurance and Related Services  
*(Same as RMG 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

PUR 301: Purchasing Resources  
(To be developed)

PUR 302: Purchasing/Stock Management  
*(Same as DIS 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

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

PUR 304: 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

PUR 305: 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
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

RMG 201A: Property Insurance as a Risk Management Tool
(to be developed)

RMG 201B: Liability Insurance as a Risk Management Tool
(to be developed)

RMG 203: The Purchase of Insurance and Related Services
(Same as PUR 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

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

RMG 305: Employee Benefits
(to be developed)
Safe and Secure 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

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

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

SAF 204: 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

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

SAF 303: Procedures and Techniques of Risk Management Safety/Loss Control
(Same as RMG 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
School Nutrition Curriculum

SNC 101: Introduction to School Nutrition
A. The legal basis—federal and state regulations
B. Non Compliance Legal Issues including Negligence
C. Differentiating between the various school nutrition programs
D. Meal program options
E. Policies, rules, regulations, and procedures
F. Menu planning systems for school meals
G. Breach of ethics
H. Safety and sanitation requirements
I. Required records and due dates
J. The Texas Nutrition Policy

SNC 104: School Nutrition Accounting
A. Fund Types
B. Accounting Considerations
C. Account Code Structure
D. Inventory Systems
E. Budgeting
F. Accounting Transactions

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

SNC 203: Nutrition Awareness
A. The rise of obesity in America
B. The Healthy Hunger Free Kids Act (HHFKA) of 2010
C. The Smart Snacks in School final rule
D. The Healthier U.S. School Challenge
E. 2015-2020 Dietary Guidelines for Americans
F. Recommended Daily Allowances (RDA) of essential nutrients
G. Nutrition information and practical ways to achieve and maintain a healthy diet and weight

SNC 205: 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

SNC 301: 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

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

SNC 303: 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

SNC 304: USDA Foods Awareness
A. Eligibility and access to USDA Foods
B. Types and uses of USDA Foods
C. Utilization of entitlement
D. Various methods of procurement
E. Methods of delivery of USDA Foods
F. Acceptable methods of storage and inventory of USDA Foods

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.
Instructional Materials Curriculum (formerly Textbooks)

TXT 101: Overview of Instructional Materials Management
(Same as DIS 104)
A. Annual cycle of instructional materials
B. Legal requirements concerning instructional materials
C. State instructional material selection
D. Sources involved with instructional material management
E. Distribution styles of management
F. Instructional material areas that need to be managed
G. EMAT – the state inventory system

TXT 102: Instructional Materials Management Procedures
A. The role of Senate Bill 6 in changing the laws related to instructional materials.
B. Steps in the evaluation & adoption process
C. Identifying the subjects up for adoption in the current proclamation
D. Chapter 66 TAC & Chapter 31 TEC
E. District research committees and their functionality
F. EMAT certification forms
G. District & campus ordering processes.
H. Inventories and audits and the role they play in instructional materials management.

TXT 202: Warehouse Shipping/Receiving
(Same as DIS 202)
A. Shipping and receiving terminology
B. Distribution and warehouse concepts
C. Material handling and storage requirements
D. Receiving operations
E. Storage operations
F. Order selection and shipping procedures
G. Developing schedules and daily routines
H. Inventory verification requirements and the various processes that can be used to meet requirements
I. Receiving and shipping standards within Distribution Centers and Warehouses

TXT 301: Managing the Curriculum Change Process
A. The connection between the instructional materials coordinator and various departments when creating new course curriculum
B. The instructional materials coordinators’ involvement during the exploring and planning stages
C. Obtaining instructional materials once a new course is approved
D. Researching instructional materials.
E. Acquiring new instructional materials
F. Communication between instructional materials coordinator and those responsible for curriculum changes
Transportation Curriculum

TRN 101: 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

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

TRN 201: Routing and Scheduling
A. Development of bus routes
B. Use of computer routing
C. Bus routing scheduling
D. Extracurricular scheduling

TRN 203: Emergency Preparedness
A. Emergency response plan development
B. Transportation department’s response role in a community disaster situation
C. Effective vehicle accident response plan
D. Information and training about severe weather situations
E. Facilities and equipment preparation
F. Knowledge of dealing with the media

TRN 205: Transporting Special Needs Students
A. Driver training
B. IEP
C. Parent interaction
D. State and national guidelines
E. Special needs equipment

TRN 301: Personnel Management
A. Staff selection
B. Staff training (probation period)
C. Supervision
D. Evaluation
TRN 302: Technology and Transportation Working Together
A. Transportation technology terms and definitions
B. Awareness of technology in transportation
C. Steps from purchasing to implementation
D. Accountability and quality control

TRN 303: Transportation Compliance Roadmap
A. Importance of compliance with state, federal and local laws
B. Calendar of deadlines
C. TEA’s School Transportation Allotment Handbook

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

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

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
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.
# APPENDIX A

## Organizations Approved for Sponsorship of Continuing Education

All persons or organizations seeking to provide Continuing Education (CEU) activities to Texas Association of School Business Officials (TASBO) certified personnel must register and be approved by TASBO. Application with instructions and a list of providers may be found on the TASBO website.

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APPENDIX B
Approved Substitute and Equivalent Courses

Substitute Course Credits
Substitute courses are those taken in lieu of specific TASBO courses. These substitutes must be approved in advance by the appropriate research committee and the TASBO Certification Committee. No more than two substitute or equivalent courses will be allowed for all certification levels combined. All substitute courses must include a test.

There are no approved substitute courses at this time.

Equivalent Course Credits
The TASBO Professional Certification Committee, upon petition from another school professional organization, will review the requirements of that organization for certification to determine which, if any, course equivalencies may be granted toward TASBO certification for that professional organization’s certified members. No more than two substitute or equivalent courses will be allowed for all certification levels combined. All equivalent courses must include a test.

TASBO / National Alliance for Insurance Education & Research Certified School Risk Manager (CSRM) Course Cross-Reference

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<td>RMG/SAF303: Procedures &amp; Techniques of Risk Mgt Safety/Loss Control</td>
<td>Handling School Risks</td>
</tr>
</tbody>
</table>

TASBO / Texas Association for Pupil Transportation (TAPT) Course Cross-Reference

<table>
<thead>
<tr>
<th>TASBO Transportation Classes</th>
<th>TAPT Certification Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID  Class Name    Hours</td>
<td>ID  Class Name    Hours</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>101 Introduction to Transportation 6</td>
<td>01 Introduction to Transportation 6</td>
</tr>
<tr>
<td>A. Introduction of duties of transportation director</td>
<td>Introduce duties of Transportation Director</td>
</tr>
<tr>
<td>B. Rules and regulations of Texas Education Agency</td>
<td>including TEA rules and regulations, state</td>
</tr>
<tr>
<td>C. State reports</td>
<td>reports, school bus and tire purchasing</td>
</tr>
<tr>
<td>D. School bus and tire purchasing procedures</td>
<td>procedures and bus driver requirements.</td>
</tr>
<tr>
<td>E. Bus driver requirements</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TASBO Transportation Classes</th>
<th>TAPT Certification Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID  Class Name    Hours</td>
<td>ID  Class Name    Hours</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>102 Student Safety Management 6</td>
<td>20.5 Student Safety Management 3</td>
</tr>
</tbody>
</table>
### A. Student management plan
- Driver training
- Classroom training
- Student conduct and safety
- Evaluation of program

Covers topics including safe student loading/unloading, safe student ridership, student evacuation procedures, protection of students from further injury following bus accidents, and procedures for students in crisis situations such as hostage, weapons, and weather.

<table>
<thead>
<tr>
<th>201</th>
<th>Routing and Scheduling</th>
<th>6</th>
<th>05</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Development of bus routes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.</td>
<td>Use of computer routing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C.</td>
<td>Bus routing scheduling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D.</td>
<td>Extracurricular scheduling</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Requirements for establishing school bus routes, understanding computer programs, extra trip scheduling, and staggered school starting times for multiple bus runs.

<table>
<thead>
<tr>
<th>202</th>
<th>Bus Inspection and Maintenance</th>
<th>6</th>
<th>06</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Development of preventive maintenance schedules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.</td>
<td>Bus replacement and recycling schedules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C.</td>
<td>Long range planning and equipment replacement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D.</td>
<td>Bus equipment standards and specifications</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Specifications and equipment for school buses, fleet replacement policies, preventative maintenance programs, parts inventory procedures and cost analysis.

<table>
<thead>
<tr>
<th>205</th>
<th>Transporting Special Needs Students</th>
<th>6</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Driver training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.</td>
<td>IEP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C.</td>
<td>Parent interaction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D.</td>
<td>State and national guidelines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E.</td>
<td>Special needs equipment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Familiarize with the legal basis for providing special transportation to include definitions of handicapping conditions and understanding terminology. Familiarize with the Individualized Education Program and current trends and court rulings; become aware of regulations governing discipline of handicapped students. Become knowledgeable of the placement process and communications used during placement; understand the role of the parent in special transportation. Develop knowledge of general guidelines and requirements for routing and scheduling of special transportation bus routes. Become aware of resources available for in-service training of special transportation personnel.

<table>
<thead>
<tr>
<th>301</th>
<th>Personnel Management</th>
<th>6</th>
<th>08</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Staff selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.</td>
<td>Staff training (probation period)</td>
<td></td>
<td></td>
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<tr>
<td>C.</td>
<td>Supervision</td>
<td></td>
<td></td>
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<tr>
<td>D.</td>
<td>Evaluation</td>
<td></td>
<td></td>
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</tbody>
</table>

Selection of staff, in-service training, job descriptions, wages and benefits, and employee award programs.
<table>
<thead>
<tr>
<th>ID</th>
<th>Class Name</th>
<th>Hours</th>
<th>ID</th>
<th>Class Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>305</td>
<td>Evaluation of Transportation</td>
<td>6</td>
<td>10</td>
<td>Evaluation of Transportation Operations</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>A. Evaluate policies and procedures for</td>
<td></td>
<td></td>
<td>Study of evaluation models for school</td>
<td></td>
</tr>
<tr>
<td></td>
<td>operating a school transportation program</td>
<td></td>
<td></td>
<td>transportation programs. Students will</td>
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<tr>
<td></td>
<td>B. Review of a module on evaluation of</td>
<td></td>
<td></td>
<td>perform an evaluation of transportation</td>
<td></td>
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<tr>
<td></td>
<td>transportation program</td>
<td></td>
<td></td>
<td>programs in their districts.</td>
<td></td>
</tr>
<tr>
<td>306</td>
<td>Preparation of State Reports and Department</td>
<td>6</td>
<td>12</td>
<td>State Reporting</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Budgeting</td>
<td></td>
<td></td>
<td>Becoming familiar with state reports and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>A. Route services report</td>
<td></td>
<td></td>
<td>funding, including rider eligibility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>B. School transportation operation report</td>
<td></td>
<td></td>
<td>requirements, eligible route service</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C. Hazardous transportation funding</td>
<td></td>
<td></td>
<td>requirements, and use of the Foundation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>D. Annual updates</td>
<td></td>
<td></td>
<td>School Program Payment System.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>E. Transportation department budgeting</td>
<td></td>
<td></td>
<td>12.5</td>
<td>Budgeting</td>
</tr>
<tr>
<td></td>
<td>1. Account codes</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>2. Assess needs</td>
<td></td>
<td></td>
<td>Becoming familiar with all parts of an</td>
<td></td>
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<tr>
<td></td>
<td>3. Manage funds</td>
<td></td>
<td></td>
<td>account code, assessing and prioritizing the</td>
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<tr>
<td></td>
<td>4. Protect investment</td>
<td></td>
<td></td>
<td>needs of your department, establishing a</td>
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<td></td>
<td></td>
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<td></td>
<td>procedure for managing funds on an annual</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>basis and protecting your investment.</td>
<td></td>
</tr>
<tr>
<td>309</td>
<td>Effective and Efficient Transportation</td>
<td>6</td>
<td>24</td>
<td>Transportation: An Effective &amp; Efficient</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>▪ Analyzing transportation programs using</td>
<td></td>
<td></td>
<td>Business</td>
<td></td>
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<tr>
<td></td>
<td>Baldrige management techniques</td>
<td></td>
<td></td>
<td>Takes the basic transportation management</td>
<td></td>
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<td></td>
<td>▪ Best practices for your district</td>
<td></td>
<td></td>
<td>techniques and shows how to create and</td>
<td></td>
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<tr>
<td></td>
<td>▪ Route design for safety and efficiency</td>
<td></td>
<td></td>
<td>evaluate a super efficient business that is</td>
<td></td>
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<tr>
<td></td>
<td>▪ Techniques for improving driver morale</td>
<td></td>
<td></td>
<td>focused on customer satisfaction.</td>
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<td></td>
<td>▪ Evaluate transportation program and</td>
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<td></td>
<td>determine baselines for continuous</td>
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<td></td>
<td>improvement</td>
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<tr>
<td></td>
<td>▪ Use data to monitor and improve daily</td>
<td></td>
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<tr>
<td></td>
<td>operations</td>
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<tr>
<td></td>
<td>▪ Productivity timeline tips</td>
<td></td>
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</tbody>
</table>
APPENDIX C
TASBO Code of Ethics

A school business official in Texas is a professional educator dedicated to public service in the schools of this state. As a professional educator one’s professional behavior must conform to a code of ethics. The code must be idealistic and practical as applied to members of our profession. School business officials acknowledge that the schools belong to the public and are created for the purpose of offering equal educational opportunity to all residents of this state. School business officials shall assume the responsibility of providing leadership and expertise as business officials to maintain exemplary standards of conduct both professionally and morally. It is understood that the business official’s actions are observed and appraised by students, fellow professionals, and members of the community.

Therefore, and to these ends, members of the Texas Association of School Business Officials or TASBO certificate holders subscribe to the following statements of standards.

The Texas School Business Official:
1. Makes the quality of education for students and the reasonable ability of taxpayers to pay the cost of education the basic values in all decisions and actions.
2. Fulfills all professional responsibilities with honesty and integrity.
3. Obeys all local, state and federal laws which govern their activities.
4. Implements to the best of their ability the policies of the Board of Trustees and the administrative regulations of their superiors.
5. Avoids the use of their position for personal gain through influence politically, socially, or economically.
6. Maintains the highest degree of professional training possible through continuing educational programs and personal research.
7. Earns academic degrees or professional certification only from accredited and legally constituted institutions.
8. Honors all contracts until fulfillment or legally released.
9. Honors the public trust.

TASBO Standards of Conduct
In this age of accountability, when the activities and conduct of school business officials are subject to greater scrutiny and more severe criticism than ever before, Standards of Conduct are in order. The association cannot fully discharge its obligation of leadership and service to its members short of establishing appropriate standards of behavior.

In relationships within the school district, it is expected that the School Business Official will:

1. Support the goals and objectives of the employing school system.
2. Interpret the policies and practices of the district to subordinates and the community fairly and objectively.
3. Implement, to the best of the official’s ability, the policies and administrative regulations of the district.
4. Assist fellow administrators as appropriate in fulfilling their obligations.
5. Build the best possible image of the school district.
6. Refrain from publicly criticizing board members, administrators, or other employees.
7. Help subordinates to achieve their maximum potential through fair and just treatment.

In the conduct of business and discharge of responsibilities, the School Business Official will:

1. Conduct business honestly, openly, and with integrity.
2. Avoid conflict of interest situations by not conducting business with a company or firm which the official or any member of the official’s family has a vested interest.
3. Avoid preferential treatment of one outside interest group, company, or individual over another.
4. Uphold the dignity and decorum of the office in every way.
5. Avoid using the position for personal gain.
6. Never accept or offer illegal payment for services rendered.
7. Refrain from accepting gifts, free services, or anything of value for or because of any act performed or withheld.
8. Permit the use of school property only for officially authorized activities.

In relationships with colleagues in other districts and professional associations, it is expected that the School Business Official will:

1. Support the actions of a colleague whenever possible, never publicly criticizing or censuring the official.
2. Offer assistance and/or guidance to a colleague when such help is requested or when the need is obvious.
3. Actively support appropriate professional associations aimed at improving school business management and encourage colleagues to do likewise.
4. Accept leadership roles and responsibilities when appropriate, but refrain from “taking over” any association.
5. Refrain from using any organization or position of leadership in it for personal gain.
APPENDIX D
Application Forms

The following forms are available in Appendix D.

- Certification Application
- Continuing Education Provider Registration Form
- Continuing Education Attendance Report
CERTIFICATION APPLICATION

Please select the level of certification for which you are applying (select only one).

☐ Certified Texas School Business Specialist (CTSBS)

☐ Certified Texas School Business Official (CTSBO)

☐ Registered Texas School Business Administrator (RTSBA)

Please read and complete each section fully and accurately.

Send completed application and documentation to:

Mail:  TASBO Certification Department  
      Attention: Linda Dufault  
      PO Box 91929  
      Austin, Texas 78709

Email:  lindad@tasbo.org  
Fax:  512-462-1782

TASBO membership is not a requirement. Additional information on program requirements, policies, and procedures is available in the TASBO Certification Manual and at www.tasbo.org/certification. For further assistance, contact TASBO staff at 512-462-1711 Ext. 218 or email lindad@tasbo.org.

APPLICATION CHECKLIST

☐ Section 1: Applicant Information  
I have completed all applicant and payment information.

☐ Section 2: TASBO Candidate Agreement and Code of Ethics.  
I have pledged to uphold the TASBO Code of Ethics and Standards of Conduct and have signed to indicate my acceptance.

☐ Section 3: Qualifying Employment Experience  
I am currently employed in a school district in a business or operations capacity, and I have met the experience set forth for the level of certification for which I am applying. My job description and service record are included with this application.

☐ Section 4: Course Requirements  
I have completed the course requirements for the level of certification for which I am applying.

☐ Section 5: Bachelor’s Degree (Only if applying for the RTSBA)  
I have a bachelor’s degree from an accredited institution of higher learning, and have included or requested an official transcript.

☐ Section 6: Letter of Recommendation  
My supervisor will send a letter of recommendation under separate cover.
SECTION 1
APPLICANT INFORMATION

Applicant Name (as it should appear on certificate) ____________________________________________

Title of Present Position ________________________________________________________________

Organization __________________________________________________________________________

Email __________________________________________ Business Telephone _________________________

Address to Mail Certificate ______________________________________________________________

City/State/Zip __________________________________________________________________________

APPLICATION FEES
Payment must accompany the application.

☐ CTSBS (Certified Texas School Business Specialist) $60—TASBO Member

☐ CTSBO (Certified Texas School Business Official) $75—TASBO Member

☐ RTSBA (Registered Texas School Business Administrator) $100—TASBO Member

$195—Nonmember

$210—Nonmember

$235—Nonmember

Payment type

☐ Check enclosed (payable to TASBO)  ☐ Visa  ☐ MasterCard  ☐ American Express

Do NOT email credit card number – if emailing application, TASBO Accounting will contact you for credit card number

Cardholder Name ________________________________________________________________

Credit Card Account # ______________________________________________________________

Expiration Date ________________ ZIP Code of Billing Address _________________________

Signature ________________________________________________________________

☐ Please send me a receipt.
SECTION 2
TASBO CANDIDATE AGREEMENT

I certify that, to the best of my knowledge, the information on this certification application is true, complete, and accurate. I authorize TASBO to verify the accuracy of any information contained in, or supplied in support of the application from any person(s) having knowledge of such information. I understand that violation of the TASBO Certification Code of Ethics and Standards of Conduct may be grounds for disciplinary action and possible denial or revocation of certification. I recognize certification, once granted, may be revoked at any time if it is established that information provided for certification or for recertification is not accurate and/or complete; if I engage in illegal or inappropriate conduct once certification is conferred; or if I violate the TASBO Code of Ethics and Standard of Conduct.

I understand that I must notify TASBO in writing to the Executive Director or Board President of the occurrence of any of the following events within 30 days of the date certificate holder has knowledge of these events:

- the conviction or imposition of deferred adjudication of the licensee or certificate holder of any of the following:
  - a felony;
  - a crime of moral turpitude;
- As used in this section, a conviction includes the initial plea, verdict, or finding of guilt, plea of no contest, or pronouncement of sentence by a trial court even though that conviction may not be final or sentence may not be actually imposed until all appeals are exhausted.

Should my certification be revoked or suspended for any reason, I understand that I must immediately cease using the TASBO credentials.

By my signature, I attest that I will maintain my certification as required and uphold the TASBO Code of Ethics and Standard of Conduct.

Applicant Signature ___________________________________________ Date ____________________
Certified individuals subscribe to the following statements of ethics and standards of conduct.

The Texas School Business Official:
1. Makes the quality of education for students and the reasonable ability of taxpayers to pay the cost of education, the basic values in all decisions and actions.
2. Fulfills all professional responsibilities with honesty and integrity.
3. Obey all local, state and federal laws which govern their activities.
4. Implements to the best of their ability the policies of the Board of Trustees and the administrative regulations of their superiors.
5. Avoids the use of their position for personal gain through influence politically, socially, or economically.
6. Maintains the highest degree of professional training possible through continuing educational programs and personal research.
7. Earns academic degrees or professional certification only from accredited and legally constituted institutions.
8. Honors all contracts until fulfillment or legally released.
9. Honors the public trust.

TASBO Standards of Conduct
In relationships within the school district it is expected that the School Business Official will:
1. Support the goals and objectives of the employing school system.
2. Interpret the policies and practices of the district to subordinates and the community fairly and objectively.
3. Implement, to the best of the official’s ability, the policies and administrative regulations of the district.
4. Assist fellow administrators as appropriate in fulfilling their obligations.
5. Build the best possible image of the school district.
6. Refrain from publicly criticizing board members, administrators or other employees.
7. Help subordinates to achieve their maximum potential through fair and just treatment.

In the conduct of business and discharge of responsibilities, the School Business Official will:
1. Conduct business honestly, openly and with integrity.
2. Avoid conflict of interest situations by not conducting business with a company or firm which the official or any member of the official’s family has a vested interest.
3. Avoid preferential treatment of one outside interest group, company or individual over another.
4. Uphold the dignity and decorum of the office in every way.
5. Avoid using the position for personal gain.
6. Never accept or offer illegal payment for services rendered.
7. Refrain from accepting gifts, free services or anything of value for or because of any act performed or withheld.
8. Permit the use of school property only for officially authorized activities.

In relationships with colleagues in other districts and professional associations, it is expected that the School Business Official will:
1. Support the actions of a colleague whenever possible, never publicly criticizing or censuring the official.
2. Offer assistance and/or guidance to a colleague when such help is requested or when the need is obvious.
3. Actively support appropriate professional associations aimed at improving school business management and encourage colleagues to do likewise.
4. Accept leadership roles and responsibilities when appropriate, but refrain from “taking over” any association.
5. Refrain from using any organization or position of leadership in it for personal gain.

Applicant Signature ___________________________________________ Date _______________
SECTION 3
QUALIFYING EMPLOYMENT EXPERIENCE

Qualifying employment experience is defined as currently working in a Texas public or non-public school or qualifying organization in a business and/or operations capacity at the time application for certification is filed and approved. Additionally, depending on which designation is being sought, additional employment experience must be met as follows.

☐ **Certified Texas School Business Specialist (CTSBS)** – Two years of school business and/or operations experience.

☐ **Certified Texas School Business Official (CTSBO)** – Three years of school business and/or operations experience, with at least two consecutive years in one district or qualifying organization.

☐ **Registered Texas School Business Administrator (RTSBA)** – Five years of school business and/or operations experience, with at least three consecutive years in one district or qualifying organization.

SUBMIT THE FOLLOWING SUPPORTING DOCUMENTATION

☐ Current job description

AND

☐ **Official Texas Service Record** or personnel record showing years of experience
SECTION 4
COURSE REQUIREMENTS

You must have completed the certification course requirements for the level of certification for which you are applying.

☐ Certified Texas School Business Specialist (CTSBS)

1. A minimum of seven courses must be completed.
2. Four courses must be taken from one area of specialization in the TASBO curriculum. Management is not an area of specialization.
3. The remaining three courses must include MGT307: Business Ethics and two courses from any of the TASBO curriculum.
4. A minimum of two courses must be taken in a classroom setting.

☐ Certified Texas School Business Official (CTSBO)

1. A minimum of ten courses must be completed.
2. Three courses must be taken from each of three different areas of specialization in the TASBO curriculum (total of nine courses). Management is not an area of specialization.
3. The remaining course must be MGT307: Business Ethics.
4. A minimum of four courses must be taken in a classroom setting.

☐ Registered Texas School Business Administrator (RTSBA)

1. A minimum of fifteen courses must be completed.
2. The following eight specific courses must be completed.
   a. MGT301: Functions and Duties of School Business Administrator
   b. MGT303: Approaches to Management and Leadership
   c. MGT306: Board Policies and Administrative Procedures
   d. MGT307: Business Ethics
   e. MGT308: Effective Communications or MGT320 Effective Advocacy – Navigating the Political Process
   f. MGT309: Business Administration and the Law
   g. MGT310: Long-Range Planning or MGT321 Managing for Performance Excellence
   h. MGT317: Financial Essentials or MGT318: Advanced Financial Concepts
3. Seven additional courses from any of the TASBO curriculum must be completed.
4. A minimum of six courses must be taken in a classroom setting.
SECTION 5

BACHELOR’S DEGREE REQUIREMENT

☐ Certified Texas School Business Specialist (CTSBS) – This section does not apply.

☐ Certified Texas School Business Official (CTSBO) – This section does not apply.

☐ Registered Texas School Business Administrator (RTSBA) – This section is required.

Bachelor’s Degree Earned______________________________________________________________

Institution ________________________________

City, State ________________________________

Year Degree Received ________________________________

If earned under a different name, list name______________________________

SUBMIT THE FOLLOWING SUPPORTING DOCUMENTATION

☐ An official college transcript

The transcript may be mailed by the college/university under separate cover to the above address, or may be a notarized copy sent from the applicant, with a statement that is a true and accurate copy.
My supervising administrator will send a letter concerning my integrity, character, and competence as a school business professional, as he/she honestly evaluated me.

SUBMIT THE FOLLOWING SUPPORTING DOCUMENTATION

☐ Letter of Recommendation
Continuing Education Provider Registration Instructions

All persons or organizations seeking to provide Continuing Education (CEU) activities to Texas Association of School Business Officials (TASBO) certified personnel must register and be approved by TASBO.

The following entities are pre-approved as providers of continuing education and are required to fill out Sections A and B of the subsequent form.

- Agencies, commissions, and/or boards of the State of Texas (243)
- Agencies, commissions, and/or boards of the Federal government (284)
- Regional education service centers
- Accredited institutions of higher education
- TASBO regional affiliates
- State and national professional education associations that have offered professional development for at least ten years and have tax exempt status
- ASBO International (111)
- Texas Society of Certified Public Accountants (108)
- American Institute of Certified Public Accountants

All other entities and organizations are not pre-approved and are required to fill out Sections A, B, and C of the registration form.

The TASBO Professional Certification Standing Committee shall be the decision-making authority on all questions and issues related to CEU approved providers.

Please submit completed registration form to:

Texas Association of School Business Officials
Director of Certification
PO Box 91929
Austin TX 78709

Email: lisa@tasbo.org
Fax: 512.462.1782

All questions regarding the CEU provider registration process should be directed to the TASBO’s Director of Certification at 512.628.1281.
Continuing Education Provider Registration Form

General instructions: All Pre-Approved providers of CEU activities must complete Sections A and B. All prospective providers must complete Sections A, B, and C.

SECTION A

Part 1 – Provider Information

Name of Provider (Individual or Organization)

Primary Contact Name

Mailing Address

City

State and Zip

Email

Phone

Fax

Website

Part 2 – Specialization Area

Check the area(s) covered in your training session(s).

<table>
<thead>
<tr>
<th>Accounting and Financial Management (includes auditing and reporting, budget and financial planning, and cash management)</th>
<th>Leadership and Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility and Construction Management</td>
<td>Purchasing and Materials Management</td>
</tr>
<tr>
<td>Human Resources / Capital Management (includes payroll management)</td>
<td>Safety and Risk Management</td>
</tr>
<tr>
<td>Information Technology Management (includes PEIMS, information technology, and records management)</td>
<td>Student Support Services (includes school nutrition, textbooks, transportation and printing)</td>
</tr>
</tbody>
</table>
SECTION B – Provider Assurances

All providers must meet the following requirements:

1. The provider must supply documentation of continuing education to the attendee. Such documentation must include the activity attended, instructor’s name, date of training, total CEU hours earned, provider’s name and provider’s TASBO identification number.
2. The provider’s goals for any training activity must be aligned with the TASBO Mission and Values Statement.
3. The provider must comply fully with the nondiscrimination provisions of all federal and state statutes, laws, and rules and prohibit unlawful discrimination in the provision of CEU activities.
4. Sessions offered by the provider must contribute to the advancement of professional knowledge and skills in school business and operations.
5. The provider must make Texas Association of School Business Officials contact information available to all attendees to facilitate requests for additional information or complaint procedures.
6. Providers who contract with other individuals or entities for the delivery of CEU activities must monitor the quality of those activities.

TASBO reserves the right to revoke approved provider status.

On behalf of the provider designated on this form, I understand and agree to the above requirements and verify that the information provided on this form is true, correct, and complete.

__________________________________________________________________________
Printed Name of Individual Provider or Authorized Representative

__________________________________________________________________________
Title of Individual Provider or Authorized Representative

__________________________________________________________________________  ____________
Signature of Applicant or Authorized Representative                        Date
Section C
General Instructions: Please provide short responses to the following items in the space provided. Applicants may be asked to submit additional information upon request.

1. Provide a brief description of your own or your organization’s qualification to provide professional development activities to TASBO-certified personnel.

2. Briefly summarize the types of continuing professional development activities/training you or your organization would provide to TASBO-certified personnel.

3. Explain how your professional development experiences are aligned to the proficiencies outlined in the TASBO Components and Competencies listed on the TASBO website at http://www.tasbo.org/get-certified/certification-manual.

4. Describe the process used for qualifying your instructors.
Continuing Education Attendance Report
for non-TASBO events sponsored by
TASBO-approved providers
(For TASBO-Certified Individuals Only)

This report contains a true and accurate record of continuing education credit hours attended and applicable to the certification program of the Texas Association of School Business Officials. Continuing education hours must be obtained from an approved provider, and must focus on school business and operations topics, such as best practices, legislative and regulatory topics. Vendor product training is not eligible for continuing education credit.

Name ________________________________________________________________

TASBO ID Number ______________________________________________________

Activity Attended ______________________________________________________

Instructor/Presenter _____________________________________________________

Date(s) of Attendance ___________________________________________________

Total Continuing Education Credit Hours __________________________________
(Attendance of 50 minutes minimum is required for each one hour)

______________________________________________________________
Approved Provider Name

______________________________________________________________
Provider ID Number

This form must be turned in to TASBO for credit to be posted. Copies of attendance forms must be retained by the certified TASBO individual for three years.
TASBO has identified eight core components, or areas of school business and operations, necessary to operate a school district in Texas. Each of the components is comprised of numerous competencies, or skills, required to be successful in that area. Due to the operational complexities of Texas school districts, various individuals within a school district may be responsible for those competencies at any given time. However, the competencies are related to the role of most school business officials, either directly or indirectly.

The TASBO Certification Course Curriculum is aligned with the Components and Competencies to ensure that each of the identified competencies is addressed in at least one certification course.

Currently under revision, the Components and Competencies will be appended upon completion in the spring of 2017.