

# PRIVATE TRAINING CATALOG

Educate + Save with  
Group Bookings from TASBO

## PROFESSIONAL SKILLS

Bud to Boss®  
Change Management  
Coaching Training  
Communication Skills  
Customer Service  
Emotional Intelligence  
Facilitation Skills  
Leadership Training  
New Supervisor Training  
Orange Frog  
Presentation Skills  
Project Management  
Time Management  
True Colors® Personal Success Workshop  
True Colors® + Conflict Navigation

## SCHOOL BUSINESS SKILLS

Campus Secretary Boot Camp  
Certification Course Content  
Developing a Fiscal Manual  
EDGAR and Texas State Procurement  
Investment Training  
PEIMS for Principals  
State and Federal Grants (EDGAR) Manual



# PROFESSIONAL SKILLS

*Half-day, one-day, and two-day versions available, except where noted.*

## BUD TO BOSS

Based on the best-selling book, *From Bud to Boss*, this workshop will provide core principles, techniques and approaches that can apply to any situation a new leader would face. Learn how to:

- Gain a better understanding of one's new role/responsibility
- Communicate with new peers that have more experience
- Gain respect, trust and credibility in the new role
- Resolve conflict between employees
- Best communicate about difficult issues
- Manage time and juggle an ever-changing list of priorities
- Help people deal with change and minimize their resistance to it
- Delegate effectively

> *2-day workshop option only*

> *90-day lead time required to book*

## CHANGE MANAGEMENT

Engage in activities to reinforce concepts such as: Assessing one's own change management strengths and weaknesses; planning for organizational and departmental readiness; learning the fundamentals of change management; leading a change management initiative; managing change from both an operational and employee perspective; building change capacity; and evaluating a change initiative.

> *60-day lead time required to book*

## COACHING TRAINING

Engage in activities to reinforce concepts such as: Learning elements of the Coaching Model; determining the role of a coach as well as the role of the performer; and practicing effective coaching conversations.

> *90-day lead time required to book*

## COMMUNICATION SKILLS

Engage in activities to reinforce concepts such as: Assessing listening skills; explaining and practicing active listening; determining the best way to get a point across; identifying the most common barriers to communication; exploring the role emotion plays in communication and how to manage its impact.

> 60-day lead time required to book

## CUSTOMER SERVICE

Engage in activities to reinforce concepts such as: Distinguishing service behaviors from service strategies or systems; assessing the service environment to find improvement opportunities; following the HELP process; improving existing strategies from the customer's perspective; examining the organization's service systems for breakdowns; and creating implementation plans with peer support.

> 90-day lead time required to book

## EMOTIONAL INTELLIGENCE

Engage in activities to reinforce concepts such as: Explaining the anatomy of emotion and how emotions influence behaviors; exploring social awareness and relationship effectiveness; practicing how to build rapport and demonstrate empathy; managing defensiveness; understanding the conditions that increase employee engagement; developing strategies for increasing teamwork amongst individuals with different emotional triggers; and increasing confidence in managing conflict and difficult conversations.

> 90-day lead time required to book

## FACILITATION SKILLS

Engage in activities to reinforce concepts such as: Differentiating the functions of leading training sessions and facilitated events; specifying actions to take at each major phase of a facilitation; rating current facilitation skills; identifying critical questions to ask; sharing best practices for dealing with challenges; determining event goals; comparing process tools; designing a facilitation process for peer review; questioning with the right question at the right time; and strategizing when and how to use facilitation techniques.

> 90-day lead time required to book

## LEADERSHIP TRAINING

Engage in activities to reinforce concepts such as: Identifying the leadership competency model; using self-awareness competencies; creating a personal mission; identifying the difference between change and transition; performing project leadership; maintaining a customer focus; identifying self-resiliency; creating emotional awareness; collaborating with others' competencies; creating organizational change readiness; and maintaining a customer focus.

> 90-day lead time required to book

> Workshop requires a \$90 pre-assessment and a facilitator certified to debrief assessment

## NEW SUPERVISOR TRAINING

Engage in activities to reinforce concepts such as: Engaging your employees; promoting communication; hiring the right employees; developing individuals; establishing a motivating environment; conducting effective performance reviews; and managing your time.

> 90-day lead time required to book

## PRESENTATION SKILLS

Engage in activities to reinforce concepts such as: Communicating messages with confidence; creating great presentations; using tools to engage audiences; delivering effective impromptu presentations; and creating an action plan to continue developing presentation skills.

> 60-day lead time required to book

## ORANGE FROG

We've long believed that success drives happiness, but it turns out it's the other way around. When we embrace a positive mindset, our brains are more engaged, creative, motivated, energetic, resilient, and productive. Reprogram your brain to create an environment that promotes happiness and well-being, which are the precursors of sustainable performance. Begin a personal transformation towards a more positive mindset and more productive and adaptable work life. Leave with the skill set to create positive change in yourself and others.

> One hour, one-day or two-days

> 90-day lead time required to book

## PROJECT MANAGEMENT

Engage in activities to reinforce concepts such as: Defining a project; developing a working definition of project management; identifying knowledge requirements for project managers; and exploring the key interpersonal skills needed for effective project management.

> 60-day lead time required to book

## TIME MANAGEMENT

Engage in activities to reinforce concepts such as: Defining time management; applying tips to approaching time management; recognizing barriers to delegating tasks; managing excuses for procrastination; determining an approach for goal setting; making time-related decisions based on core values; exploring productivity and organization tools to assist with time management; discovering solutions for common "time robbers"; setting expectations for how to manage time and prioritize; and identifying a goal for improvement of time management skills.

> 90-day lead time required to book

## THE TRUE COLORS® PERSONAL SUCCESS WORKSHOP

A hands-on and interactive personality workshop that guides participants through the foundational concepts of the True Colors system as they apply to personal and professional lives. This True Colors personality workshop leads to improved communication skills, a greater appreciation for the uniqueness of self and others, and more meaningful relationships.

> One hour or half-day (3hrs)

> 30-day lead time required to book

## THE TRUE COLORS® + CONFLICT NAVIGATION

Conflict is a part of everyday life and the ability to navigate or negotiate your way is a powerful skill. Each human interaction has the potential to be a challenge that could lead to conflict. Learning the skills regarding how to navigate conflict situations is a key part of this workshop.

> Full day (6-hour) workshop option only

> 90-day lead time required to book

# SCHOOL BUSINESS SKILLS

*Full Day (6-hour) Options Only*

## CAMPUS SECRETARY BOOT CAMP

The role of a campus secretary is often filled with complex tasks, high stress and little time. This workshop will address many of the business-related tasks unique to campus-level accounting. Topics include account codes; activity funds; budget monitoring and amendment; cash management and petty cash; communication skills; customer service; purchasing; and records management and retention.

*> 30-day lead time to book*

## CERTIFICATION COURSE CONTENT

The TASBO certification program has over 100 one-day courses covering the breadth of school business content.

*> Access the full course catalog on [tasbo.org/get-certified](https://tasbo.org/get-certified)*

*> 60-day lead time to book*

## DEVELOPING A FISCAL MANUAL

Prepare a Fiscal Manual using a template developed by TASBO. Every participant will enter the information for their own district's business operations and should leave at the end of the day with their own customized Fiscal Manual. The manual will include general operating procedures that set the foundation for fiscal management. Discuss:

- Activity account management
- Cash management
- Donations
- Fixed assets, and other critical business functions

*> 60-day lead time to book*

## EDGAR AND TEXAS STATE PROCUREMENT

Developed through a collaboration of school purchasing and finance leaders, this workshop guides participants through procurement standards outlined in the 2 CFR Sections 200.317 to .326. The document provides guidance for district procurement when using

federal funds. Topics include: conflict of interest; contracted services; certification of bids; micro-purchases; co-ops; sole source; and cost analysis. Geared towards purchasing staff, grant accountants, and grant administrators involved in facilitating federal fund purchases.

> 60-day lead time to book

## **INVESTMENT TRAINING**

Designed to meet the requirements of the Public Funds Investment Act (PFIA). The law requires investment officers to attend at least 10 hours of training relating to the officer's responsibilities within 12 months after assuming the duties and at least 8 hours of additional training every two years thereafter. The workshop covers an overview of the PFIA, district compliance, authorized and unauthorized investments, financial accountability, and the Federal Reserve System. Topics include: cash management; internal controls; managing risk; GASB; cash flow; depository relationships; and detecting fraud.

> Workshop provides 6 hours of PFIA training

> Visit [tasbo.org](http://tasbo.org) for more information on an additional 2-hour webinar

> 60-day lead time to book

## **PEIMS FOR PRINCIPALS**

This interactive and informative workshop will increase understanding of campus data that is reported to PEIMS, how to improve data quality, obtaining guidance for campus decisions surrounding attendance and scheduling, and how to review reports as required by TEA. Topics include: laws, codes and rules; attendance-taking rules; average daily attendance coding vs. scheduling; funding; master schedule development; 90% credit/final grade denial; and compulsory attendance/truancy.

> 60-day lead time to book

## **STATE AND FEDERAL GRANTS (EDGAR) MANUAL**

Participants will receive guidance on creating a customized State and Federal Grants Manual for their district. The updated Word version of the template, that includes the Uniform Guidance (new EDGAR) requirements, will be provided.

> 90-day lead time to book

# ADDITIONAL INFORMATION

## PRIVATE TRAINING

Private training offers an opportunity for districts, organizations, and groups to design professional development that meets their specific needs. In addition to the core offerings, the TASBO professional development team is available to consult with you on developing training to match your particular organizational needs. If you are interested in educating a department or a large team, private training is something to consider!

Benefits include:

- Cost Effective
- Designed Content
- Timely
- Address Local Concerns

## ABOUT TASBO

TASBO is the trusted resource for school finance and operations. Established in 1946, TASBO began as a forum for exchanging ideas and sharing information about school business operations in Texas. Currently, TASBO has nearly 7,000 members and 27 regional affiliates, representing more than 850 public school districts in Texas.

## CONTACT

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## VISIT [TASBO.ORG](https://tasbo.org) TO LEARN MORE



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