

**CARROLLTON EXEMPTED VILLAGE SCHOOL DISTRICT
Carrollton Professional Development Committee**

IPDP - BASIC INFORMATION

TREASURERS/BUSINESS MANAGERS

Please complete the following:

Name _____ Date _____

District _____

Home Address _____

Phone Numbers - Home: _____ office: _____

e-mail: _____

Current Assignment

Title _____

	License 1	License 2	License 3
Current License Identification Number	_____	_____	_____
Effective date new license begins	_____	_____	_____

Please note: This completed and signed five page IPDP (Form #1 & Form #2) must be submitted to the superintendent's office at the same time you submit your completed license/certificate renewal packet.

**Individual Professional Development Plan
(Treasurers/Business Managers)**

Name _____

Date _____

Recently enacted higher performance expectations placed on public schools have brought with them a near mandate that **ALL** professional development for educators be aligned with goals and activities. Competencies 1-5 and related activities are derived from the field experience requirements of the approved Program Equivalency for the School Treasurer License.

To complete your Individual Professional Development Plan (IPDP), select at least:

- **Three** of the five competencies listed below as your Professional Development Goals.
- Under **each goal**, select:
At least two Professional Development Activities that appropriately describe professional development activities you plan to participate in over the **next five years**.

Please note: You must earn 6 semester hours or 18 CEU's (or a combination thereof), distributed across the three competencies you have selected, to renew your license at the end of this five-year cycle.

Please note: This completed and signed five page IPDP (Form #1 & Form #2) must be submitted to the superintendent's office at the same time you submit your completed license/certificate renewal packet.

COMPETENCY 1: FINANCIAL MANAGEMENT

Goal: To administer district fiscal affairs to enable the district to provide the best possible educational services with the financial resources available.

Activities: I will participate in college or university course work, CEU experiences, and/or Equivalent Other Activities (EOA) options that provide opportunities to increase my knowledge and skills so I may become more proficient in the following areas of concentration:

- 1. bonds and notes
- 2. budgets and appropriations
- 3. investments
- 4. risk management
- 5. school finance

Name _____

COMPETENCY 2: FUND ACCOUNTING

Goal: To direct and manage all financial accounting programs and systems.

Activities: I will participate in college or university course work, CEU experiences, and/or Equivalent Other Activities (EOA) options that provide opportunities to increase my knowledge and skills so I may become more proficient in the following areas of concentration:

- 1. accounting
- 2. cash management
- 3. extracurricular finance
- 4. government accounting
- 5. internal control
- 6. records management
- 7. office management procedures.

COMPETENCY 3: FINANCIAL REPORTING

Goal: To prepare, maintain, retrieve, analyze, and disseminate federal, state, and local reports relating to fiscal operations of the district.

Activities: I will participate in college or university course work, CEU experiences, and/or Equivalent Other Activities (EOA) options that provide opportunities to increase my knowledge and skills so I may become more proficient in the following areas of concentration:

- 1. computer applications
- 2. electronic data processing
- 3. forecasting and fiscal analysis
- 4. GAAP
- 5. general purposes financial statements and cash reporting
- 6. statistics.

Name _____

COMPETENCY 4: PURCHASING AND BUSINESS FUNCTIONS

Goal: To direct, manage, and monitor all purchasing programs and supervise support services.

Activities: I will participate in college or university course work, CEU experiences, and/or Equivalent Other Activities (EOA) options that provide opportunities to increase my knowledge and skills so I may become more proficient in the following areas of concentration:

- 1. bidding and purchasing procedures
- 2. collective bargaining and labor relations
- 3. food services
- 4. fringe benefits (type, enrollment, claims)
- 5. payroll (processing, distribution, reports)
- 6. personal contracts and salary schedules
- 7. purchasing, supply management, and inventory
- 8. transportation

COMPETENCY 5: LEGAL/LEGISLATIVE ISSUES

Goal: To administer fiscal affairs of the district in accordance with statutory responsibilities, legislative mandates, and board policy.

Activities: I will participate in college or university course work, CEU experiences, and/or Equivalent Other Activities (EOA) options that provide opportunities to increase my knowledge and skills so I may become more proficient in the following areas of concentration:

- 1. bonding (short-and long-term)
- 2. fiscal certificates
- 3. FMLA, ADA, FLSA, Workers' Compensation
- 4. legal notices
- 5. real estate
- 6. school law and Ohio compliance functions
- 7. tax analysis

Name _____

Assurances:

Your signature below assures the CPDC committee you have developed a quality Professional Development Plan that is:

1. related to increasing your knowledge and skills related to fiscal matters,
2. related to responsibilities in your job description,
3. customized to suit your individual professional needs,
4. aligned with your district goals,
5. fulfilled through the completion of six semester hours or 18 CEUs (or a combination thereof) of PD work distributed across the competencies selected for your IPDP.

I certify that the informational items and responses provided in this IPDP are true and accurate to the best of my knowledge.

Signature

Date

Necessary revisions or comments:
