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# Iowa School Business Management Academy

April 23-24, 2024

Memorial Union

Iowa State University—Ames, Iowa

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Professional Certification Program and  
School Business Official Authorization  
Program for New and Continuing School  
Administrators and School Business  
Officials

**Register By  
March 18  
before late fees  
are added!**

**Levels II and IV**  
April 23-24, 2024

ISBMA is a partnership between the following entities: Iowa Association of School Business Officials, Iowa State University, Area Education Agency Business Managers, Iowa Association of School Boards, Iowa Department of Education, Office of the State Auditor of Iowa, Iowa Board of Educational Examiners, and School Administrators of Iowa.

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## About the Academy

The Iowa School Business Management Academy (ISBMA) has been providing school administrators and school business officials an efficient and effective way to develop high-level knowledge and skills in school finance and school business management with the goal of fostering leadership, innovation, and service to Iowa's students and schools since the 1990's. 2024 will be the final year of Iowa State University's Iowa School Business Management Academy. Drawing a conclusion to a program that's been in existence for over 30 years presents unique challenges. In order to provide continuity to the Academy's previous participants, Iowa State University, the founding institute of the Academy, has agreed to provide Levels II and IV for the final year of the program. Level II programming will allow participants the opportunity to complete the program of study toward receiving regular school business official authorization through the Iowa Board of Educational Examiners. Level IV will enable past Level III completers the opportunity to become members of the Iowa School Business Management Academy's final graduating class and earn a proficiency diploma and proficiency plaque.

Because of the uniqueness of this year's Academy, please note the following changes from prior years:

- Classes will meet in-person two days rather than 2.5 days (Level IV) or 3 days (Level II).
- Classes not meeting in-person on April 23 or 24 will be provided via Zoom.
  - Level II
    - Tuesday, April 17 for two 2-hour sessions, required (Communicating Information to the Public @ 9 am and Budgeting Revenues @ 1 pm)
    - One additional 2-hour session, Facility Planning, is also required but not yet scheduled.
  - Level IV
    - Thursday, April 25 (1 hour session, Mentor Program, is optional but highly recommended for any SBO interested in becoming a mentor in the Iowa School Business Institute's new SBO authorization program.)
    - Friday, April 26 (2-hour session, Long-term Debt, required)
- The opening session on Tuesday, April 23 begins at 9 am. This 1-hour session is required in the Level II program and optional for Level IV participants. Prior to the 2023 Academy, this 1-hour session, Legal System as Applied to School Districts Part II, a session presented by Danielle Hainfield of Ahlers & Cooney, P.C., was part of Level III programming. Due to changes in Level III last year, this 1-hour session was moved to Level II. This year's Level IV participants have an opportunity to attend this session that was not part of last year's programming and earn an additional one credit hour to be applied toward renewal of the standard SBO authorization. For individuals unable to attend the 9 am session in-person, a recording of this session will be available following this year's Academy.

- All sessions offered either preceding or following the in-person Academy days, April 23 and 24, will be recorded and available for viewing for individuals unable to attend at the scheduled times.
- Due to the reduced number levels and, consequently, a reduced number of participants at this year's Academy, the lunch break has been reduced to 40 minutes. This allows for each day to end at 4:20 pm rather than 5 pm.

The Academy will be held at the Memorial Union, Iowa State University, 2229 Lincoln Way, Ames, IA. The Memorial Union [Parking Ramp](#) is located on the south side of central campus adjacent to Lincoln Way. When entering the parking ramp, please take a ticket. At the registration table located in the Cardinal and Gold Rooms, parking validation tickets will be issued to you with your name badge. The procedures for the Memorial Union Parking Garage

1. Take a ticket as you enter the ramp.
2. When exiting the ramp:
  - i. Put the ticket you received when you entered into the neon-green slot at the exit gate.
  - ii. Once the dollar amount is shown on screen, enter the "validation" ticket.
  - iii. Gate will open after transaction has been completed.

As an alternative, you may also use one of the pay stations located within the Memorial Union or parking garage to validate the parking ticket. You have a 15-minute grace period to get to your vehicle and arrive at the exit gate (this length can be adjusted by MU staff on high-traffic days).

### **PROGRAM INFORMATION**

The Academy certification program is designed in levels, with the foundational training curriculum offered in sequence over a four-year period.

Participants completing all of the sessions in Levels I-IV will earn an Academy Proficiency Diploma.

The curriculum of the Academy is aligned with Iowa's Standards for School Business Official Preparation Programs.

The Academy participants have the option of taking an annual post-academy online assessment to verify their proficiency in the topics covered in Levels I-IV. (Levels I & II assessments are required for those in the New SBO Authorization Program.) The certificate for completing the Academy's seat-time requirements is referred to as the Academy's Proficiency Diploma. Any participant who earns a diploma and completes the four assessments with a minimum of 75 percent accuracy on each will also be awarded with a "Proficiency Plaque."

Register online beginning February 21 at the ISBMA website: [education.iastate.edu/isbma](http://education.iastate.edu/isbma). Registration prior to the conference is required for all levels. The registration fee includes all conference materials and meals.

**Levels II and IV**

\$470—anyone who registers on or before March 18

\$570 – any registration received after March 18

\$60—any registration for Level II, Communication & Interpersonal Relationship Skills session only (4/24 @ 1:30 pm)

The registration fee includes \$40 to cover parking at Memorial Union for the 2-day in-person event. For those registering for the Level II Communication & Interpersonal Relationship Skills session, the \$60 registration fee includes parking for the afternoon of April 24.

No registrations will be accepted after April 8.

Fees are to be paid prior to the start of the Academy. Online payment of fees is requested. If that is not possible, checks should be made to Iowa State University and mailed to Registration Services, 1601 Golden Aspen Drive, Ste. 110, Ames, IA 50010. (Your name and online registration order number must be included on your check.)

If you have questions about registration, please call Registration Services at (515) 294-6222, or email [registrations@iastate.edu](mailto:registrations@iastate.edu).

Fee refunds are 100 percent if registration is cancelled on or before March 18, and 50 percent if cancelled between March 18 and April 7. No refunds will be issued on cancellations made after April 8. If you do not cancel by the deadlines noted above, you are responsible for paying the registration fee.

The Gateway Hotel & Conference Center (2100 Green Hills Dr, Ames) is holding a block of rooms at a reduced rate for the Iowa School Business Management Academy until April 17. You are responsible for making your own room reservations at the [Gateway Hotel](#) or call 515-292-8600 and identify the group name as “Iowa School Business Management Academy.” Here is the link to book <https://reservations.travelclick.com/2958?groupID=4138813>

Other nearby hotels:

Radisson Hotel (515-268-8808)

Country Inn & Suites (515-233-3935)

Sleep Inn & Suites (515-337-1171)

GrandStay Hotel & Suites (515-232-8363)

Continental breakfasts and buffet luncheons (T-W) are provided as part of your registration fee. On Wednesday, a hot breakfast will be served.

Participants in Level II are required to attend all assigned classes and complete the Level II assessment as part of the New SBO Authorization Program. Participants in Level IV are required to attend all course components and assigned classes in order to qualify for an Academy Proficiency Diploma. Unavoidable absence must be cleared with an Academy co-director; make-up work will be assigned at Level II and may be assigned at Level IV.

Faculty for the Academy are carefully selected from among the best professional talent in a given area of study. Whether the topic is law, finance, accounting, or support services, you will find that the Academy faculty are outstanding. Most faculty are actual field practitioners and each is an expert in his/her field. You will have an opportunity to evaluate each instructor to ensure that the highest quality instructional staff are maintained.

The class schedule is on the last pages of this brochure.

Presentations and class materials will be posted to Google Drive.

## **Iowa School Business Management Academy**

**April 23-24, 2024**

Register online at the Academy's [webpage](#)

Registration opens February 21

## Academy and Registration Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>February</b>	19	20	21 Early Registration opens (\$470)	22	23	24
25	26	27	28	29	1	2
<b>March</b>	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 End of Early Registration (\$470); Last day of 100% refund to cancel registration	19 Registration fee \$570; 1 <sup>st</sup> day of 50% registration refund	20	21	22	23
24	25	26	27	28	29	30
<b>April</b>	1	2	3	4	5	6
7	8 End of Registration Period; Last day to receive 50% registration refund	9	10	11	12	13
<b>14</b>	15	16	17 Level II Virtual (2 sessions)	18	19	20
<b>21</b>	22	23 Academy	24 Academy	25 Level IV Virtual (1-hr session)	26 Level IV Virtual (2-hr session)	

**Iowa School Business Management Academy**  
**In-Person: April 23-24, 2024**  
**Virtual: See Virtual Sessions column for Date and Time**

Level II		Level II		Level IV	Level IV
Virtual Sessions	Tuesday, April 23	Cardinal Room 2 <sup>nd</sup> floor	Tuesday April 23	Gold Room 2 <sup>nd</sup> floor	Virtual Session
<b>Wednesday, April 17</b>	8:15-10:00	Continental Breakfast - Campanile Room (2 <sup>nd</sup> floor)	8:15-10:00	Continental Breakfast - Campanile Room (2 <sup>nd</sup> floor)	<b>Thursday, April 25</b>
<a href="#">Communicating Information to the Public</a> AJ Ellingson 9:00 – 10:50 am	9:00 – 9:50	Legal System Applied to School Districts Part II  <b>Danielle Haindfield</b>  (Required session for Level II. For those unable to arrive by 9 am, a recording will be available following the Academy.)	9:00 – 9:50	Legal System as Applied to School Districts Part II <i>OPTIONAL Session in Cardinal Room</i>  <b>Danielle Haindfield</b>  (An additional 1 hr credit is available for this session, in-person or via recording.)	<a href="#">Mentor Program</a>  Shirley Maxwell  2:00 – 2:50 pm
<a href="#">Budgeting Revenues</a> Kurt Subra 1:00 – 2:50 pm	10:00-11:50	Legal System and Procedures as Applied to School Districts Part I  <b>Danielle Haindfield</b>	10:00-11:50	Using Technology to Prepare Public Reports & Manage Records  <b>Adam Kurth</b>	<b>Friday, April 26</b>
<b>Thursday, April 18</b>	11:50-12:30	Lunch (Baked Potato Bar) – Campanile Room (2 <sup>nd</sup> floor)	11:50-12:30	Lunch (Baked Potato Bar) – Campanile Room (2 <sup>nd</sup> floor)	<a href="#">Long-term Debt</a>  Sarah Enfield 9:00 – 10:50 am
<a href="#">Facility Planning</a> Rob Olsen 8:00 – 9:50 am	12:30-2:20	Cash Management  <b>Kate Baldwin</b>	12:30-2:20	Spreadsheets  <b>Mike Kalvig</b>	
	2:30-4:20	Legal – Employment Law  <b>Emily Ellingson</b>	2:30-4:20	<a href="#">Legal – Advanced Governance: Sharing &amp; Reorganization</a>  <b>Brett Nitzschke</b>	
	<b>Wednesday, April 24</b>	<b>Cardinal Room</b>	<b>Wednesday, April 24</b>	<b>Gold Room</b>	
	7:00-8:00	Breakfast Buffet – South Ballroom (2 <sup>nd</sup> floor)	7:00-8:00	Breakfast Buffet – South Ballroom (2 <sup>nd</sup> floor)	
	8:00-9:50	Accounting – Internal Controls  <b>Johna Clancy &amp; Jill Gavin</b>	8:00-9:50	Audit Reports/ Financial Analysis  <b>Brandon Hansel</b>	
	10:00-11:50	Overview of Budgeting Expenditures  <b>Shonna Trudo</b>	10:00-11:50	Legal – Bonding & Contracting  <b>Emily Kolbe &amp; James Wainwright</b>	
	11:50-12:30	Lunch (Feast of Italy) – South Ballroom (2 <sup>nd</sup> floor)	11:50-12:30	Lunch (Feast of Italy) – South Ballroom (2 <sup>nd</sup> floor)	

	<b>12:30-1:20</b>	Calculating & Analyzing District Spending (continued from the 10 am session) <b>Shonna Trudo</b>	<b>12:30-2:20</b>	Accounting - Fixed Assets <b>Leslie Finger</b>	
	<b>1:30-4:20</b>	Communication & Interpersonal Relationship Skills <b>Buzz Hoffman</b>	<b>2:30-4:20</b>	Facility Management <b>Dave Berger</b>	

*Afternoon Break on Tuesday at 2:20 – 2:30 pm will be located in the Campanile Room.*

*Afternoon Break (10 min.) on Wednesday sometime between 2:20 and 3:00 pm will be located in the South Ballroom.*