

**Jefferson County Educational Service Center Consortium  
Local Professional Development Committee  
Individual Professional Development Plan  
Basic Information  
Treasurers/Business Managers**

Please complete the following: (Please Type)

Name \_\_\_\_\_ Date \_\_\_\_\_

District \_\_\_\_\_

Home Address \_\_\_\_\_  
\_\_\_\_\_

Phone Numbers - Home: \_\_\_\_\_ Office: \_\_\_\_\_

E-Mail \_\_\_\_\_

**Current Assignment**

District \_\_\_\_\_ Position \_\_\_\_\_ #of Years \_\_\_\_\_

**Previous Assignment (Most Recent Only)**

District \_\_\_\_\_ Position \_\_\_\_\_ #of Years \_\_\_\_\_

Total # of Years Experience \_\_\_\_\_

**License 1**

**License 2**

**License 3**

❖ Educator State Identification Number \_\_\_\_\_

❖ Effective Date New License Begins \_\_\_\_\_

**Please Note: This completed and signed 4-page IPDP (Form #1 & Form #2) must be submitted to your District Superintendent's Office at the same time you submit your Renewal Packet.**

## Individual Professional Development Plan

[ Treasurers/Business Managers ]

Name \_\_\_\_\_

Date \_\_\_\_\_

To complete your Individual Professional Development Plan (IPDP), select at least  **three [3]** of the five competencies listed below as your Professional Development Goals.

Under **each goal**, select  **at least two [2]** Professional Development Activities that appropriately describe professional development activities you plan to participate in over the next five years.

### **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 coursework, 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.

### **COMPETENCY 2: FUND ACCOUNTING**

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

**Activities:** I will participate in college or university coursework, 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 coursework, 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 purpose financial statements and cash reporting
- 6. statistics.

**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 coursework, CEU experiences, and/or 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. personnel 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 coursework, CEU experiences, and/or 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

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**To be completed by LPDC only**

\_\_\_\_\_  
Approved as submitted on: \_\_\_\_\_

\_\_\_\_\_  
Not approved: resubmit with revision(s) noted **below** by: \_\_\_\_\_  
Date

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LPDC Subcommittee Member

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LPDC Subcommittee Member

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LPDC Subcommittee Member

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LPDC Subcommittee Member

**Necessary revisions or comments:**

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