



Maine Association of School Business Officials

2009- 2010

MeASBO Application for Membership

It is time to renew your membership to MeASBO for 2009-2010. The membership fees have remained the same and continue to be a real bargain. MeASBO is an affiliate of ASBO International and Tri-State ASBO. MeASBO provides its members informative monthly meetings with timely topics, a newsletter published three times a year, and the opportunity to meet and discuss issues with your peers. Please contribute to the continued success of the MeASBO by sending in your membership today.

Maine Association of School Business Officials

Name: _____ Title: _____

Name of Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Work Phone: _____ Ext: _____ Fax: _____ Home Phone: _____

E-mail address: _____ Cell Phone: _____

Check one:

VOTING MEMBERSHIP (Definitions follow)

ACTIVE MEMBER	\$50.00
LIFE MEMBER	\$20.00
EMERITUS	\$15.00

NON-VOTING MEMBERSHIP

EDUCATION ASSOCIATE	\$20.00	
AFFILIATE	\$15.00	
CONSULTANT ASSOCIATE	\$200.00	(Vendor Category)

Please mail with your payment to:

MeASBO
C/O Kathy Warren
MSAD #8
22 Arcola Lane
Vinalhaven, ME 04863

207-863-2588

kwarren@vinalhavenschool.org

President
1st Vice President
2nd Vice President
Treasurer
Secretary

Madeline Bassett
Herbert Hopkins
Stacie Lowe
Kathy Warren
Sherrie Weese

MEMBERSHIP CATEGORIES

The Executive Council shall have the authority to establish membership categories with the two types of membership: (1) voting; (2) non-voting. The Executive Council shall have the authority to determine the membership category for which each applicant is eligible.

A. Voting memberships shall be as follows:

1. Active. An Active Member shall be a person who is:
 - (a) Employed full time by a public school or private school entity, or a post secondary college or technical school or full-time employees of educational agencies of Maine state government; and
 - (b) engaged in an administrative, supervisory or financial staff support responsibility in one or more areas of school business management.
2. Life. A Life Member shall be a person who has been an active member for a minimum of ten (10) years and who, at the time of application for Life Membership, meets the requirements of Active Membership.
3. Emeritus. An Emeritus Member shall have been an Active member for a minimum of ten (10) years at the time of his or her retirement from full-time school business administration and shall not be currently employed full time in a school entity.

B. Non-voting memberships shall be as follows:

1. Education Associate. An Education Associate Member shall be a person who is employed in education administration or demonstrates a non-commercial interest in school business administration, such as: school board members, superintendents, principals, and faculty and students of post secondary colleges and technical schools and those who do not qualify for other types of membership.
2. Affiliate. Affiliate members are those individuals who are employed full-time in school business operations, but in a position which does not include administrative or supervisory responsibilities.
3. Consultant Associate. A Consultant Associate Member shall be a person who benefits from commercial activity in the area of school business administration.

**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

Benefits

- 1 provides access to information and training that is specific to law and regulations
- 2 provides a basis for advancing professionalism of School Business Officials in schools

Program

MeASBO certification courses provide a great deal of information rather than in-depth training. They are intended to cover major points about their respective topics, offer an opportunity for questions and discussion, and provide resource information for future use.

The recommended beginning course for School Business Official is *Introduction to School Business*. Although anyone may benefit from this or other individual certification courses, the full program is generally intended for School Business Official in their first 1 - 5 years of employment. However any person employed in school business operations who meets the stated requirements may receive School Business Official certification. There is no requirement for holding a particular position in a school district.

Requirements

This program and the courses listed have been created and reviewed by the Professional Development Committee (PDC). An applicant for certification must be a member of MeASBO, and hold a Bachelor's Degree including 18 credit hours of business/finance courses. The applicant must also complete the courses described below or satisfy the requirement through the development of a portfolio.

School Business Official II

Benefits

- 1 provides access to information and training that is specific to law and regulations
- 2 provides a basis for advancing professionalism of School Business Officials in schools

Program

MeASBO certification courses provide a great deal of information rather than in-depth training. They are intended to cover major points about their respective topics, offer an opportunity for questions and discussion, and provide resource information for future use.

The recommended beginning course for School Business Official II is *Introduction to School Business*. Although anyone may benefit from this or other individual certification courses, the full program is generally intended for School Business Official in their first 1 - 5 years of employment. However any person employed in school business operations who meets the stated requirements may receive School Business Official II certification.

Requirements

This program and the courses listed have been created and reviewed by the Professional Development Committee (PDC). An applicant for certification must be a member of MeASBO, as well as hold a Bachelor's Degree with no experience including 9 credit hours of business/finance courses or hold an Associate's degree with a minimum of 10 years experience as a School Business Official and submission of a portfolio. The applicant must also complete the courses described below or satisfy the requirement through the development of a portfolio.

School Business Official I

Benefits

- 1 provides access to information and training that is specific to law and regulations
- 2 provides a basis for advancing professionalism of School Business Officials in schools

Program

MeASBO certification courses provide a great deal of information rather than in-depth training. They are intended to cover major points about their respective topics, offer an opportunity for questions and discussion, and provide resource information for future use.

The recommended beginning course for School-Business Official I is *Introduction to School Business*. Although anyone may benefit from this or other individual certification courses, the full program is generally intended for School Business Official in their first 1 - 5 years of employment. However any person employed in school business operations who meets the stated requirements may receive School Business Official I certification.

Requirements

This program and the courses listed have been created and reviewed by the Professional Development Committee (PDC). An applicant for certification must be a member of MeASBO, as well as hold an Associate's Degree including 6 credit hours of business/finance courses or have no degree with a minimum of 10 years experience in a Business Office position and submission of a portfolio. The applicant must also complete the courses described below or satisfy the requirement through the development of a portfolio.

**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

Course Descriptions - Contact hours

- > **Introduction to School Business (14 hrs)**
An overview of school business operations with a focus on several key areas. The program will begin with a brief background on the general functions of the School Business Official (SBO). Major components of the program will include: listing and describing reports that must be filed with federal, state, and local agencies; reviewing school laws and Revised School Code; introducing fund accounting processes; reviewing school organizational issues and operational issues (how school boards and administrators function); and exploring inter-relationships between the business office and site operations - offices in school buildings, facilities, transportation, and food services. Part of the program would be devoted to discussion about the roles and functions of the School Business Official.

- > **Bonding/Borrowing/Investing (3 hrs)**
Legal and practical issues relating to how school districts bond, borrow, and invest funds, including an overview of cash flow analysis, arbitrage, and general borrowing and investing options.

- > **Cash Management (3 hrs)**
This session will develop specifications for the selection of banking and other financial services, teach you how to apply concept of compensating balances, comprehend procedures and legal constraints for cash collection and disbursement, analyze monthly internal transfers and loans, prepare a cash flow analysis, including a fund balance report for the board of education, and identify and deal with fraud and abuse.

School Business Official II

Course Descriptions- Contact hours

- > **Introduction to School Business (14 hrs)**
An overview of school business operations with a focus on several key areas. The program will begin with a brief background on the general functions of the School Business Official (SBO). Major components of the program will include: listing and describing reports that must be filed with federal, state, and local agencies; reviewing school laws and Revised School Code; introducing fund accounting processes; reviewing school organizational issues and operational issues (how school boards and administrators function); and exploring inter-relationships between the business office and site operations - offices in school buildings, facilities, transportation, and food services. Part of the program would be devoted to discussion about the roles and functions of the school business official.

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School Business Official I

Course Descriptions- Contact hours

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**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

School Business Official II

School Business Official I

Course Descriptions - Contact hours

Course Descriptions- Contact hours

Course Descriptions- Contact hours

> Facilities for the Business Manager (3 hrs)

The basic structure and function of building and grounds and maintenance operations, laws relating to school construction, environmental laws and regulations, planning maintenance programs, and what to expect from your director of facilities.

> Food Services for Business Manager (3 hrs)

The basic structure and function of a food services program, food safety issues, vending and contracting for food services, and cooperative ventures.

> Information Systems (3 hrs)

Use of computers and technology in the business office and the classroom, including: overview of hardware, developing a technology plan, major business office software applications, and telecommunications issues.

> Instructional Program Evaluation (3 hrs)

This session will help the Business Manager understand the components of instructional programs within the school district; planning and implementing program improvement; analyzing economic factors associated with delivering and evaluating instructional programs. Learn how to develop procedures for the evaluation and reporting the cost-effectiveness of programs; use evaluation data toward changes to the instructional program; and how to allocate resources to improve the programs.

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**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

School Business Official II

School Business Official I

Course Descriptions - Contact hours

Course Descriptions- Contact hours

Course Descriptions- Contact hours

> Insurance and Risk Management (3 hrs)

Review of the insurances necessary for school operations with a primary focus on: Workers' Compensation, cafeteria plans, property/casualty, health insurance, liability insurance, errors and omissions, and methods of risk management. A portion of the program would be devoted to understanding options for purchasing insurance: pools, cooperatives, private vendors, and self-insurance.

> Labor Relations/Employment Law (6 hrs)

Major state and federal employment laws, that apply to public schools. Includes: collective bargaining, wage and hour, discrimination, COBRA, Family Medical Leave Act, and federal and state retirement issues.

> Payroll & Related Personnel Issues (3 hrs)

Laws and regulations related to the payroll function including: state and federal payroll laws and regulations, pertinent tax regulations, employee retirement plans, practical aspects of completing a payroll, and electronic check deposits.

> Principles of Education (3 hrs)

Provides an understanding of: the educational process, culture of schools, major learning theories, teaching methodologies, school improvement, design of in-service programs, and the structure and function of the principalship.

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**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

School Business Official II

School Business Official I

Course Descriptions - Contact hours

Course Descriptions- Contact hours

Course Descriptions- Contact hours

> Effective Communications (3 hrs)

This certification class will help you express yourself more effectively, have more influence with your colleagues and appear more confident in front of others. This is a highly practical and interactive course. In this workshop you'll have the opportunity to learn key techniques and strategies to: send clear messages, create credibility, use body language effectively, and listen for understanding. This class allows you to build on your existing skills as you experiment and learn through practical experience.

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> Purchasing (3 hrs)

Basics of performing the purchasing function, including: related laws, the structure of a purchasing operation, electronic and cooperative purchasing, bidding, reviewing contracts, lease-purchase options, and "partnerships".

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**> Revenue, Expenditures and Budgeting
Part I and Part II (6 hrs each)**

General explanation of: school revenue and transfer sources, and the process and structure of accounting for budgets and expenditures. Subjects include: the School Aid Act, accounting manuals, property taxes, fund accounting, forecasting and projecting, and federal and state programs. Part II will be a continuation of Part I and will also provide an opportunity for participants to bring their district's budget to the workshop to ask specific questions and solicit

suggestions.

**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

Course Descriptions - Contact hours

> Strategic Planning (3 hrs)

This session will focus on team participation in the identification of short- and long-term goals in all aspects of school district activities. Drawing from current research and practices, you will explore opportunities for your school district. This class will also assist in the making of a strategic plan that will move the district toward the achievement of its mission and goals. The session will provide data-sets required to facilitate the strategic planning process and assist in the implementation, monitoring, evaluation, reporting, and revision of a strategic plan.

> Team Leadership (3 hrs)

The components of leadership in general, and the methods and challenges of managing people including: recruiting, training, motivating, and evaluating your staff.

> Technology for the Business Manager (3 hrs)

This session will assist the Business Manager in promoting the development of staff training in technology for the school district. It will focus on developing long-range planning for the school district, while assigning appropriate specifications for technology purchasing. Technology infrastructure contracting for the school district, evaluating the cost benefits of producing information in relation to organiza-

School Business Official II

Course Descriptions- Contact hours

> Team Leadership (3 hrs)

The components of leadership in general, and the methods and challenges of managing people including: recruiting, training, motivating, and evaluating your staff.

> Technology for the Business Manager (3 hrs)

This session will assist the Business Manager in promoting the development of staff training in technology for the school district. It will focus on developing long-range planning for the school district, while assigning appropriate specifications for technology purchasing. Technology infrastructure contracting for the school district, evaluating the cost benefits of producing information in relation to organiza-

School Business Official I

Course Descriptions- Contact hours

> Team Leadership (3 hrs)

The components of leadership in general, and the methods and challenges of managing people including: recruiting, training, motivating, and evaluating your staff.

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**Maine Association of School Business Officials
Voluntary Certification Tracks**

School Business Official III

Course Descriptions - Contact hours

> Transportation for the Business Manger (3 hrs)

The basic structure and function of a transportation department, equipment supply and purchase, and laws related to transportation.

> Wrap-up (2 hrs)

A concluding session to very briefly review the major program content areas, provide references and resource materials, and offer a chance for the participants to reflect back and look forward on their roles.

Total Class Time: 79 hours

Continuing Education hours are 100 within 5 yrs which may include up to 9 hours of teaching a course.

School Business Official II

Course Descriptions- Contact hours

> Wrap-up (2 hrs)

A concluding session to very briefly review the major program content areas, provide references and resource materials, and offer a chance for the participants to reflect back and look forward on their roles.

> Elective (6 hrs)

Any course taken outside of this certification track but required in another.

Total Class Time: 52 hours

Continuing Education hours are 75 within 5 yrs

School Business Official I

Course Descriptions- Contact hours

> Wrap-up (2 hrs)

A concluding session to very briefly review the major program content areas, provide references and resource materials, and offer a chance for the participants to reflect back and look forward on their roles.

> Elective (6 hrs)

Any course taken outside of this certification track but required in another.

Total Class Time: 34 hours

Continuing Education hours are 50 within 5 yrs

Letter of Commitment

Date: _____

Deb Holland
MeASBO PDC Chair
Maine Association of School Business Officials
486 Turner Center Road
Turner ME 04282

Dear Ms. Holland:

This is to inform you of my desire to begin the MeASBO Voluntary Certification Program on _____, 2009. I understand that I am expected to complete the program within ***three (3) years*** of my starting date.

I am seeking MeASBO Voluntary Certification in the following category:

- School Business Official I
- School Business Official II
- School Business Official III

I agree to commit myself to pursue continual improvement and the highest ethical standards of my profession.

Sincerely,

Signature

Name (typed or printed): _____

Title: _____

School District: _____

Street Address: _____

City/State/Zip: _____

Telephone: _____ Cell: _____

E-mail: _____



Maine Association of School Business Officials Voluntary Certification Program - Initial Application

Date: _____

Your Application must include:

- 1. Your job description
- 2. Current organizational chart of your school entity
- 3. Accredited College/University Courses (accompanied by transcripts)

Submitted By:

Name: _____

Title: _____

School District: _____

Address: _____

City/State/Zip: _____

Phone: _____

Fax: _____

Email: _____

Cell: _____

Application fee of \$60.00 made payable to MeASBO – will be collected at the time of completed requirements as approved by MeASBO

Applying for certification as a (check one):

- School Business Official I
- School Business Official II
- School Business Official III

Please mail completed application along with supporting documents to:

Deb Holland, PDC Chair
486 Turner Center Road
Turner, ME 04282

<p>MeASBO Use Only:</p> <ul style="list-style-type: none"> <input type="checkbox"/> MeASBO dues paid <input type="checkbox"/> Application fee paid

Educational Background / Employment History

Educational Background

List Names and locations of educational institutions you attended	Dates Attended	Major	Certificate, degree or number of credits
College:			
College:			
Graduate School:			
Other:			
Other:			

Employment History (list the last fifteen years only)

Name of Employer	Begin Date / End Date	Position Held
Current Employer:		
Previous Employer:		
Previous Employer:		
Previous Employer:		
Previous Employer:		
Previous Employer:		

Don't Forget to Include:

- Your job description
 - Organizational Chart of your school entity
 - Signature of the Superintendent of Schools
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Verification by the Superintendent / Applicant Signature

Verification/Support by the Superintendent

I certify that the applicant is known by me to possess a high degree of character and integrity, and has demonstrated competence and proficiency in school business assignments and responsibilities. I support the applicant in earning voluntary certification and will commit to allow the applicant time to meet the requirement to earn the certification.

Signature: _____

Print/Type Name: _____

Position: _____

School District: _____

Address: _____

City/State/Zip: _____

Telephone: _____

Applicant Signature

This is to certify that I, the undersigned, have complied with all the requirements for the status of certification and submitted this evidence on the following pages; I agree to uphold high standards of ethics, a commitment to my professional responsibilities in school business management; and I will make every effort to contribute to my profession and to the Maine Association of School Business Officials.

I verify that I am a member of Maine Association of School Business Officials. I certify to the truth and accuracy of all the statements and representatives made in this application.

I hereby grant permission to Maine Association of School Business Officials, its staff, and/or its Professional Development Committee to review and verify the information contained in, or in connection with, this application.

I, (name of applicant) _____, certify I am with this school district and that the information in this application is accurate and correct to the best of my knowledge.

Signature of Applicant

Date



**Maine Association of School Business Officials
School Business Official I - Certification Checklist**

This is an Evaluation - not a Certificate

Name:	Date:		Evaluator:
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A Requirements	Completed	Portfolio	Needs	Comments
Associate's Degree with no experience or				
Minimum 10 years experience with portfolio*				
Business / Finance - 6 credit hours				

B Course Descriptions	Completed	Portfolio	Needs	Comments
1 Introduction to School Business (14 contact hrs)				
2 Cash Management (3 contact hrs)				
3 Information Systems (3 contact hrs)				
4 Principles of Education (3 contact hrs)				
5 Team Leadership (3 contact hrs)				
6 Wrap-up (2 contact hrs)				
7 Elective (3 contact hrs)				
8 Elective (3 contact hrs)				

Total Class Time: 34 contact hours
Continuing Education contact hours are 50 within 5 yrs

When you complete any of the above requirements, please submit the documentation to this office. Please send only official transcripts for college courses.

For PDC use only:	
Number of Courses that are Completed:	_____
Number of Courses that are Needed:	_____

* Portfolio - A portfolio provides evidence of accomplishments, skills, abilities and it documents the scope and quality of a person's experience and training. Portfolios can be used as one mean to meet a required course as well as to meet the education level requirement.



**Maine Association of School Business Officials
School Business Official II - Certification Checklist**

This is an Evaluation - not a Certificate

Name:	Date:		Evaluator:
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A Requirements	Completed	Portfolio	Needs	Comments
Bachelor's Degree with no experience or				
Associates Degree with 10 years experience & portfolio*				
Business / Finance - 9 credit hours				

B Course Descriptions				
1 Introduction to School Business (14 contact hrs)				
2 Cash Management (3 contact hrs)				
3 Information Systems (3 contact hrs)				
4 Labor Relations/Employment Law (6 contact hrs)				
5 Payroll & Related Personnel Issues (3 contact hrs)				
6 Principles of Education (3 contact hrs)				
7 Effective Communications (3 contact hrs)				
8 Purchasing (3 contact hrs)				
9 Team Leadership (3 contact hrs)				
10 Technology for the Business Manager (3 contact hrs)				
11 Wrap-up (2 contact hrs)				
12 Elective (3 contact hrs)				
13 Elective (3 contact hrs)				

Total Class Time: 52 contact hours
Continuing Education contact hours are 75 within 5 yrs

When you complete any of the above requirements, please submit the documentation to this office. Please send only official transcripts for college courses.

For PDC use only:	
Number of Courses that are Completed:	_____
Number of Courses that are Needed:	_____

* Portfolio - A portfolio provides evidence of accomplishments, skills, abilities and it documents the scope and quality of a person's experience and training. Portfolios can be used as one mean to meet a required course as well as to meet the education level requirement.



**Maine Association of School Business Officials
School Business Official III - Certification Checklist**

This is an Evaluation - not a Certificate

Name:	Date:	Evaluator:
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<u>A Requirements</u>	<u>Completed</u>	<u>Needs</u>	<u>Comments</u>
Bachelor's Degree			
Business / Finance Classes - 18 credit hours			

<u>B Course Descriptions</u>	<u>Completed</u>	<u>Portfolio</u>	<u>Needs</u>	
1 Introduction to School Business (14 contact hrs)				
2 Bonding/Borrowing/Investing (3 contact hrs)				
3 Cash Management (3 contact hrs)				
4 Facilities for the Business Manager (3 contact hrs)				
5 Food Services for Business Manager (3 contact hrs)				
6 Information Systems (3 contact hrs)				
7 Instructional Program Evaluation (3 contact hrs)				
8 Insurance and Risk Management (3 contact hrs)				
9 Labor Relations/Employment Law (6 contact hrs)				
10 Payroll & Related Personnel Issues (3 contact hrs)				
11 Principles of Education (3 contact hrs)				
12 Effective Communications (3 contact hrs)				
13 Purchasing (3 contact hrs)				
14 Revenue, Expenditures and Budgeting Part I (6 contact hrs)				
15 Revenue, Expenditures and Budgeting Part II (6 contact hrs)				
16 Strategic Planning (3 contact hrs)				
17 Team Leadership (3 contact hrs)				
18 Technology for the Business Manager (3 contact hrs)				
19 Transportation for the Business Manger (3 contact hrs)				
20 Wrap-up (2 contact hrs)				

Total Class Time: 79 contact hours

Continuing Education contact hours are 100 within 5 yrs (up to 9 contact hours can be received for teaching)

When you complete any of the above requirements, please submit the documentation to this office. Please send only official transcripts for college courses.

For PDC use only:	
Number of Courses that are Completed:	_____
Number of Courses that are Needed:	_____

* Portfolio - A portfolio provides evidence of accomplishments, skills, abilities and it documents the scope and quality of a person's experience and training. Portfolios can be used at this level as one mean to meet a required course.