

SFO Certification: Recognizing High Standards for Managers of School Business Operations Today



According to the 21st Century Workforce Commission National Alliance of Business document, “Building America’s 21st Century Workforce. Executive Summary, “The current and future health of America’s 21st century economy depends directly on how broadly and deeply Americans reach a new level of literacy—21st century literacy—that includes strong academic skills, thinking, reasoning, teamwork skills, and proficiency in using technology.”

Other abilities often considered 21st century skills include creativity and innovation, problem solving, communication, and collaboration, according to *Twenty-First Century Skills*, published by the Metiri Group in partnership with the North Central Regional Educational Laboratory.

Would you be successful in your job without thinking and reasoning, without being an effective team member, or without using technology every day? That is doubtful.

Would you be effective in your job without having the knowledge and skills necessary to deal with the many content areas your job encompasses day in and day out? Not likely.

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There is no better time to identify the specific skills and knowledge needed by those managing the business operations of schools today.

The health of the economy is most certainly related to the quality of our schools. That quality, however, can be maintained only when district responsibilities are handled by skilled professionals.

Leadership in Challenging Times

These are challenging times for schools across the United States and Canada, and the ability of those providing the fiscal leadership of these multi-million dollar organizations has never been more critical. There is no better time to identify the specific skills and knowledge needed by those managing the business operations of schools today, and then recognize those who have taken the initiative to measure their own qualifications against these standards.

Toward that end, ASBO is introducing a new, ground-breaking school business management certification program this fall: the Certified Administrator of School Finance and Operations (SFO) program. This program, designed by and for school business officials, will provide a way for professionals to identify themselves as meeting the standards associated with the position. Certification will be available to practitioners throughout the United States and Canada.

Qualifying to become a Certified Administrator of School Finance and Operations (SFO) will mean meeting the education and experience prerequisites while adhering to the prescribed code of conduct and successfully completing an exam. See Table 1 for details about the program eligibility requirements.

Table 1. SFO Eligibility Criteria

To demonstrate eligibility, candidates must submit an application documenting compliance with the following formal education, work experience, and professional conduct requirements:

Pathway to Certification

Step 1: Take and pass SFO Exam Part 1: Accounting

Step 2: Take and pass SFO Exam Part 2: School Business Management

Step 3: Adhere to the ASBO International Certification Code of Conduct

Certification Prerequisites

Step 1: There are no prerequisites to take the SFO Exam Part 1: Accounting.

Step 2: Meet one of the three options below.

A. Master's degree in a field related to school business management plus two years of experience as a school business official with overall administrative responsibility for, or administrative experience in, the areas in the exam competencies.

OR

B. Bachelor's degree plus three years of experience as a school business official with overall administrative responsibility for, or administrative experience in, the areas in the exam competencies.

OR

C. After the beta test, professionals not meeting the educational requirements, but who believe they are seasoned practitioners, will have the opportunity to apply.

Experience Requirements

Depending on education level, candidates must have at least 24 or 36 months of overall administrative responsibility in each of these school business related areas:

- Managing accounting systems
- Managing accounting functions
- Conducting financial planning and analysis
- Conducting budgeting and reporting activities.

Candidates must also have at least 24 or 36 months of administrative experience, depending on education level, in at least three of the following school business related areas:

- Risk management activities
- School facilities
- Information systems
- Human resource functions
- Ancillary services.

The first step in developing the program was to outline the tasks school business officials perform. Once that was completed, it was necessary to identify the skills and knowledge needed to do complete those tasks. To that end, practicing school business officials took part in focus groups to conduct an analysis of the responsibilities of school business officials. In the process, they outlined the business official's typical areas of responsibility and then specified the more detailed subtasks within each of those areas. The percentage of time spent in each area also was identified.

These results were validated further through a survey that was distributed to 23,600 members of ASBO and ASBO affiliate organizations. Respondents—1,639

from all 50 states and five provinces—were asked about the tasks specified. In addition, they were asked for the frequency and importance of each task as well as whether one had to have the requisite knowledge or skills at entry to the job or would need it within the first six months, within the first year, or after the first year.

This input clearly divided the job of a school business manager into two distinct areas: (1) those areas of expertise needed at the time of job entry, and (2) those competencies needed after the professional has gained experience in the job. The specific content areas and tasks listed in Table 2 serve as the outline for each part of the exam. Included are the percentages of each exam that the content area represents.

Table 2. SFO Exam Content Outline

Knowledge-Part 1: Accounting	% of Exam (70 questions)
Manage Accounting Systems	28-33 %
Maintain Accounting Software	
Maintain Chart of Accounts	
Reconcile General Ledger Accounts	
Track Fixed Assets	
Manage Accounting Functions	67-72%
Manage Payroll Functions	
Manage Accounts Receivable	
Manage Accounts Payable Process	
Manage Purchasing Procedures	
Manage Annual Budgets	
Prepare Financial Reports	
Manage Cash Flow	
Knowledge-Part 2: School Business Management	% of Exam (100 questions)
Conduct Financial Planning and Analysis	27-32%
Serve as a School Leader	
Review Financial Impact of Strategic Planning Goals	
Develop Financial Goals	
Evaluate Funding Options for Debt Management	
Develop Outside Funding Sources	
Analyze Economic Data	
Analyze Demographic Data	
Develop Multi-Year Forecast	
Estimate Real Estate Property Tax Revenues	
Conduct Budgeting and Reporting Activities	15-20%
Project Student Enrollment	
Evaluate Instructional Program(s) Costs	
Develop Annual Budgets	
Manage Grant Activities	
Prepare for Annual Audit	

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The first part of the exam will contain 70 questions, with the second and larger part made up of 100 questions. Candidates for certification may choose to take both parts of the exam together or they may take the first part at one time and the second exam later. Successful completion of both parts is required to qualify for certification.

The purpose of both parts of this exam is to show evidence of meeting the standards. Therefore, the questions have been developed with the help of a cross-section of practicing business officials from the United States and Canada and are designed to assess the knowledge and skills being employed by people in the field every day. The full program will be put into place this fall with a Beta test conducted during the summer.

Given the many facets of school finance and operations that the role of a school business manager includes, it is not always easy to convey to others what the job entails or the expertise needed to do it well. The content outline for the exam as well as its successful completion

can help others understand the components of the job and the range of responsibilities undertaken.

Show Me the Expertise

The Certified Administrator of School Finance and Operations (SFO) program will help already strong practitioners demonstrate their knowledge and skills needed to do their jobs. Employers will be able to show that the people they hire to assume these vital management positions have unique expertise and know-how to do the job, and that the interests of their constituents are being protected as a result.

More information about the Certified Administrator of School Finance and Operations (SFO) program is available on ASBO's Website, www.asbointl.org/certification

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Table 2. (continued)

Knowledge-Part 2: Accounting	% of Exam (100 questions)
Conduct Risk Management Activities	10-15%
Evaluate Existing Risks	
Address Results of Risk Audit	
Conduct Annual Evaluation of Insurance Plans	
Manage Insurance Plans	
Manage School Facilities	7-12%
Update Facility Master Plan	
Oversee the Operation and Maintenance of School Campuses	
Oversee New Construction and Renovations	
Manage Information Systems	4-6%
Assist in Developing a Technology Plan	
Maintain Technology Systems/Oversee Telecommunication Systems	
Manage Human Resource Functions	15-20%
Manage Hiring of New Employees	
Develop Compensation Structure	
Manage Staff Development and Training Programs	
Manage Evaluation Process	
Manage Personnel Administration	
Manage Employee Benefit Programs	
Manage Ancillary Services	7-12%
Manage Transportation Services	
Manage Food Service Programs	
Manage Purchasing Process	
Manage Other Service Programs	