ASBO International

SFO® Certification:
Creating Your Career Pathway

Uncommon Times

The worst economic meltdown since the Great Depression of the 1930s.

Families and communities struggle with

- Job Loss
- Business Closures
- Education Cuts

The Impact on Students

- Instructional program reductions
- Increased class sizes
- Staff reductions
- Reductions in transportation and other services
- Fewer after-school activities
- A four-day school week
- Reductions and elimination of vital professional development staff

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Wanted:
Effective School Business Leaders

Must Have

- Skills and experience to establish sound fiscal practices that support educational goals.
- Reliable and current information upon which to base good decisions.
- Excellent communication skills
- A commitment to integrity and transparency.

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ASBO International:
Developing Leaders Since 1910

Our Mission

To provide programs and services to promote the highest standards of school business management practices, professional growth, and the effective use of educational resources.

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Promoting Common Values

- Competence
- Integrity
- Professional Growth
- Responsibility
- Accountability

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Elevating the Profession

SFO® Certification

Professionals with the **Certified Administrator of School Finance and Operations® (SFO®)** have met the standard of experience and expertise in school business management and demonstrated knowledge and skill through an examination of school business management competency.

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School Business Management Credentials

- States and provinces have varying degrees of requirements
  - Required certificate/license
    - 17 States and 1 Province
  - Voluntary certificate/registration
    - 19 States and 1 Province
  - No policy/program
    - 14 States and D.C. and 4 Provinces
- Only portable credential in North America
- Provides a career pathway for the profession
- Increases visibility and credibility for the profession

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Creating the SFO® Program

- Followed credentialing industry standards
- Over 60 practitioner volunteers involved
- Job task analysis results lead to exam content
- Beta test program in 2010, with first 100 certified

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SFO® Value

- Validate skills
- Demonstrate knowledge
- Increase visibility & marketability
- Demonstrate professionalism and competency to your stakeholders

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Demographics

- Range from 2 to 32 years of experience
- Public K – 12, charter schools, and technical schools
- Less than 2,000 students to over 10,000 students
- Less than $5M in revenues to greater than $50M in revenues

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SFO® Program Requirements

- Adhere to the Certification Code of Conduct
- Meet the education and years of experience criteria
- Pass the two-part exam
- Once certified, have annual renewal and recertification requirements

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Program Fees

- Application fee
  - $150 for ASBO International members
  - $225 for non-members; includes one-year eligibility period.
- Exam fees
  - $195 for *Part 1: Accounting* and
  - $295 for *Part 2: School Business Management*;

  each exam fee includes a five-month authorization to test window.
- Certification annual renewal fee
  - $125 and sign the Code of Conduct
- Recertification period of three years; no additional fees.

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Eligibility Requirements

- *Part 1: Accounting* of the Exam
  - No education requirements
  - No experience requirements
- *Part 2: School Business Management* of the Exam and the SFO Certification
  - Bachelor's degree and three years of related experience

  OR
  - Master's degree in a related field plus two years of related experience

  OR
  - Application process is available for seasoned practitioners not meeting these requirements

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Experience Requirements

- Depending on education level, you must have at least 24 or 36 months of overall administrative responsibility at a K-12 or community college education system in each of these school business related areas:
  - Managing accounting systems
  - Managing accounting functions
  - Conducting financial planning and analysis
  - Conducting budgeting and reporting activities.

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Experience Requirements

- You must also have at least 24 or 36 months of administrative experience at a K-12 or community college education system, 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.

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Exam

- *Part 1: Accounting* focuses on skills needed at job entry – 70 multiple-choice questions
- *Part 2: School Business Management* focuses on knowledge gained after three years of experience – 100 multiple-choice questions
- Written by and for school business officials – includes Canadian equivalents

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Exam Part 1: Accounting

- **Manage Accounting Systems (28% to 33%)**
  Maintain Accounting Software
  Maintain Chart of Accounts
  Reconcile General Ledger Accounts
  Track Fixed Assets
- **Manage Accounting Functions (67% to 72%)**
  Manage Payroll Functions
  Manage Accounts Receivable
  Manage Accounts Payable Process
  Manage Purchasing Procedures
  Manage Annual Budgets
  Prepare Financial Reports
  Manage Cash Flow

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Exam Part 2: School Business Management

- **Conduct Financial Planning and Analysis (27% to 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% to 20%)**
  Project Student Enrollment
  Evaluate Instructional Program(s) Costs
  Develop Annual Budgets
  Manage Grant Activities
  Prepare for Annual Audit

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Exam Part 2: School Business Management

- **Conduct Risk Management Activities (10% to 15%)**
  Evaluate Existing Risks
  Address Results of Risk Audit
  Conduct Annual Evaluation of Insurance Plans
  Manage Insurance Plans
- **Manage School Facilities (7% to 12%)**
  Update Facility Master Plan
  Oversee the Operation and Maintenance of School Campuses
  Oversee New Construction and Renovations
- **Manage Information Systems (4% to 6%)**
  Assist in Developing a Technology Plan
  Maintain Technology Systems/Oversee Telecommunication Systems

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Exam Part 2: School Business Management

- **Manage Human Resource Functions (15% to 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% to 12%)**
  Manage Transportation Services
  Manage Food Service Programs
  Manage Purchasing Process
  Manage Other Service Programs

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Taking the Exam

- Administered at Pearson VUE testing centers in U.S. and Canada
- Computer-based, year-round
- Testing available Monday – Saturday (in most locations)
- Schedule directly with Pearson VUE after you have applied and registered online with ASBO

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Preparing for the Exam

- Guide to Studying for the SFO Examinations
  - Practice questions
  - Tips on starting and conducting study groups
  - Authoritative reference list
- Study prep course listing online

www.asbointl.org/certification

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Earning the SFO Credential

- Use SFO® after your name
- Press release sent to superintendent, school board and local press
- Certificate of certification and lapel pin

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Annual Renewal

- Adhere to Certification Code of Conduct
- Annual fee to maintain
- Access to *SFO® Credential Management System*
  - Publish credentials
  - Record contact hours

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Recertification

- Every three years submit 90 contact hours
  - Hours must be tied to exam content outline
  - 60 hours from structured learning environment (workshops, conferences, online classes, etc.)
  - 30 hours from unstructured learning environment (work experience, authorship, instructor, volunteer service, etc.)

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Application Process

- Online *SFO® Credential Management System* http://i7lp.integral7.com/asbo
- Applications accepted year-round
- Testing is available year-round

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Test Your SBO IQ

Sample Exam Part 1

- **Q: What does the "Function" describe in the Chart of Accounts?**

A. The item for which an expenditure is made

B. The activity being performed for which a service or material object is acquired

C. A way of classifying expenditures by physical location, budget or cost center

D. A plan of activities and procedures designed to accomplish a predetermined objective

Sample Exam Part 2

- **Q: What is the primary purpose of a physical risk inspection?**

A. To identify potential maintenance issues

B. To identify potential future building needs

C. To identify potential entry points for intruders

D. To identify potential threats to the safety of students, staff, and the public

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Spread the Word

Obtain your SFO® certification and encourage the colleagues in your state/province to do the same.

www.asbointl.org/certification