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
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.
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.
Promoting Common Values

- Competence
- Integrity
- Professional Growth
- Responsibility
- Accountability
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.
School Business Management Credentials

- States and provinces have varying degrees of requirements
  - **Required certificate/license**
    - 16 States and 1 Province
  - **Voluntary certificate/registration**
    - 15 States and 1 Province
  - **No policy/program**
    - 19 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
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
SFO® Value

• Validate skills
• Demonstrate knowledge
• Increase visibility & marketability
• Demonstrate professionalism and competency to your stakeholders
SFO® Professionals

- 134 SFO® certified globally

- In 35 States, 1 Province, and 1 Overseas

- 5 in Alaska
  - Melody Douglas
  - Luke Fulp
  - Leslie O’Conner
  - Cynthia Reilly
  - Chad Stiteler
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
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
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.
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
Experience Requirements

• Depending on education level, you 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.
Experience Requirements

• You 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.
Exam

- **Part 1: Accounting**
  - Skills needed at job entry
  - 70 multiple-choice questions

- **Part 2: School Business Management**
  - Knowledge gained after three years of experience
  - 100 multiple-choice questions

- Written by and for school business officials
  - Canadian equivalents
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
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
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
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
Taking the Exam

• Administered at Pearson VUE testing centers in U.S. and Canada
  • Alaska Sites: Anchorage
  • Contact ASBO for a case-by-case inquiry

• 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
Test Day Protocol

• Arrive half-hour before scheduled time

• Two IDs
  ▫ Government issued photo ID with signature
  ▫ ID with signature
  ▫ Name on ID must match name on exam registration

• Part 1: Accounting exam – 2 hours with 70 questions

• Part 2: School Business Management exam – 2.5 hours with 100 questions
Recognition

• Use SFO® after your name

• Press release sent to superintendent, school board and local press

• Certificate of certification and lapel pin
Annual Renewal

• Adhere to Certification Code of Conduct

• Annual fee to maintain

• Access to SFO® Credential Management System
  • Publish credentials
  • Record contact hours
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.)
Application and Studying Process

• Online *SFO® Credential Management System*
  [http://i7lp.integral7.com/asbo](http://i7lp.integral7.com/asbo)

• Applications accepted year-round

• Self-study
  • Practice Questions
  • Authoritative Reference List
  • Contact an SFO professional

• Test-prep course information found at
  [www.asbointl.org/certification](http://www.asbointl.org/certification)
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
Spread the Word

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

www.asbointl.org/certification