

**MONTANA ASSOCIATION OF  
SCHOOL BUSINESS OFFICIALS**

# **Professional Certification Program**

**For School Business Officials**





# MASBO PROFESSIONAL CERTIFICATION PROGRAM

## **Purpose**

The Montana Association of School Business Officials has developed the following voluntary program of professional certification and continuing education in order to provide a recognized standard of competence for school district business managers and district clerks, and specialists eligible for active MASBO membership.

## **Eligibility**

All MASBO members who are in active membership status and who meet the standards and qualifications established by the MASBO Board of Directors shall, upon application, be certified for a period of four years. A Standard Certificate or Business Specialist Certificate shall be issued unless the applicant has passed an examination for the Montana Registered School Business Official Certificate. Testing is not required for the standard certificate.

## **Procedure**

1. Obtain an application form from the MASBO Office.
2. To receive your certificate at MCEL, submit the application on or before October 1st of each year. To receive your certificate at the MASBO summer conference, submit the application on or before May 1st of each year.
3. The application will be reviewed and evaluated based on the information received. The Executive Director may request such information as is deemed necessary to verify applications. An application for initial certification or for renewal may be denied if MASBO is unable to satisfactorily verify any material representation contained in the application. The MASBO Board of Directors has final approval authority.
4. Certificates will be awarded at the Montana Conference of Educational Leadership (MCEL) and/or the Annual Summer Conference.
5. Information on the necessary continuing education credits and an explanation of the 4 year period are on page 4.

Questions about this certification program or clarification of requirements shall be addressed to:

M A S B O  
208 North Montana Suite102  
Helena, MT 59601  
lbrannon@masbo.com  
(406) 442-5599  
Fax: (406) 442-1356  
[www.masbo.com](http://www.masbo.com)



### **To Renew a Certificate**

To renew the designated certificate for a subsequent four-year period, the recipient must meet the continuing eligibility requirements as established by the MASBO Board. All certificates expire on October 1 or May 1 and is valid for 4 years. (i.e.: a certificate awarded in 2007 expires in 2011 on either the May 1 date or the October 1 date)

### **To Upgrade**

A member who holds an unexpired Standard certificate and wishes to upgrade to a professional certificate, may do so with the following conditions:

- 1) If the certificate upgrade requested is of a higher level, 120 credit hours must be provided. Upgrade credits need to be earned in the 4 year renewal period. The 4 year period is defined as the 4 years prior to application deadline.
- 2) If the applicant is upgrading from standard to professional, the test must be successfully completed.
- 3) The appropriate application\_fee for renewal or testing will be charged.
- 4) Renewal or upgrade applications do not need the letters of verification of experience.

### **Appeal Process**

In the event an application is not approved by the MASBO Board of Directors, the applicant will be notified, in writing, of that decision. The applicant shall have the right to appeal the decision by written notification that he/she wishes to appeal. Such notice must be received by the Executive Director within thirty (30) days from the date of the original notification. The Executive Director shall forward all relevant data to all members of the Board of Directors. The decision of this Board will be final and further appeal will not be permitted. The entire appeal process must be completed within 120 days of the original denial notice.

## **TYPES OF CERTIFICATION**

The following certificate may be issued by MASBO:

### **A. BUSINESS SPECIALIST CERTIFICATE**

The applicant shall have three years experience in the area of specialization in a system wide administrative and/or supervisory position. The applicant must manage, supervise or perform three or more functions within a specific area of specialization. Subject areas\* of specialization that will be considered are Personnel Management, Risk Management, Purchasing/Supplies Management, Payroll and Facilities Management. If there are other areas of specialty not mentioned, written requests may be made to and approved by the MASBO Board of Directors.

Requires 100 hours for an initial or renewal certificate, of which at least 90 hours shall be in the area of specialization.

**B. STANDARD CERTIFICATE**

Requires the applicant to attend a curriculum of coursework. No test is required for the Standard Certificate. For initial certification, eligible hours will be honored from the 4 years prior to application deadline.

Requires 120 hours for an initial or renewal certificate.

**C. PROFESSIONAL CERTIFICATE**

Requires the applicant to successfully complete the coursework required for a Standard Certificate and achieve at least a 70% on 3 tests designed to show proficiency at the subject area of testing. A candidate who fails the test may retake the test at a cost of an additional \$25.00. The tests may be taken at any time when the required number of education credit hours has been earned.

To begin the testing process, completion of the applicable form and completion of 120 continuing education hours must be presented and approved. An additional 120 continuing education hours (240 total) and successful passing of all testing levels must be completed to receive the title of Montana Registered School Business Official (MRSBO). All 3 levels of tests must be completed in 3 years.

Level 1 – Testing will be in the following subject areas\*: A, B, C, D, E

Level 2 – Testing will be in the following subject areas\*: F,G, H, I, J

Level 3 – Testing will be in the following subject areas\*: K, L, M, N and O.

120 hours of continuing education hours are required over a four year period for renewal of the Montana Registered School Business Official Certificate.

**\*SUBJECT AREAS**

A. Board Agenda/Minutes B. Elections C. Payroll D. School Finance E. Pupil Transportation	F. Personnel Management G. Student Activity Accounting H. Purchasing/Supplies Management I. Food Service J. School Law	K. Risk Management L. Records Management M. Facilities Management N. Ethics O. Bond and Bond Elections
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## **CONTINUING EDUCATION HOURS**

Continuing Education Hours may be earned by attending and participating in workshops or seminars that are pertinent to applicant's job area. If credits are submitted but deemed not applicable and applicant disagrees, that decision may be appealed to the MASBO Board. The Board decision is final. Credits for renewal are valid only in the period earned and excess credits may not be carried over into the next renewal period.

Each applicant must maintain a file of schedules and supporting documentation for the initial and renewal certificates.

Prior to the MASBO Board formal review and approval of applications for certification, the Executive Board of MASBO may audit several applications. The applicant under audit will need to provide to the Board the supporting documentation for the hours claimed and any other information requested.

Approved Conferences include (but are not limited to) programs sponsored by the Montana Association of School Business Officials (MASBO), Association of School Business Officials International (ASBO), Montana School Boards Association (MTSBA), School Administrators of Montana (SAM), Montana Office of Public Instruction (OPI), university or vocational technical courses, or any other Montana educational organization or governmental agency involved with schools.

The MASBO Board reserves the right to request documentation of seminars or workshops to determine whether the subject matter is eligible and the number of hours assigned.

### **Presenter Credit**

A presenter at an approved workshop, clinic or seminar shall receive 2 hours for each 1 hour of presentation (i.e., a one hour clinic = 2 hours earned). A presentation of the same program on the same day would be eligible for presenter credit (i.e., two 1 hour presentations on the same day would equal 4 hours earned)

### **Officer and Director Credit**

MASBO Officers & Directors shall earn 20 hours for each year served.

### **MASBO Committee Members**

Committee Chairs may receive 8 hours for each year served and requires MASBO Board verification.

Committee members may receive 4 hours for each year served. The committee assignment requires at least six hours of involvement by the applicant during the year to be eligible for credit and requires committee chair verification.

**Mentor Credit**

4 hours for each year served and mentor assignment requires at least 8 hours involvement per year and requires the regional coordinator verification.

**College Credit**

College credits more than 4 years old are good for the initial certificate. After initial certification, college credits must be within the prior 4 year period.

*Credit Conversion*

1 quarter college credit = 10 continuing education hours

1 semester college credit = 15 continuing education hours

## **REVOCACTION OF CERTIFICATE**

A registered MASBO Certificate may be revoked by the MASBO Board of Directors. Revocations may arise from falsification or misrepresentation of information relied upon to grant the certificate or conviction of a crime relevant to the character or competency of a registrant to practice his or her profession.

An individual whose registration is to be revoked will be notified in writing of the reason for such revocation at least forty-five (45) days before the planned date of Board action. The registrant shall have the right to appeal the decision to revoke the registration by written notification to the Executive Director of the intent to appeal. Such notice shall be received within 30 days of the date of the planned Board meeting. Documentation supporting the appeal must be received at least 10 days before the day of the planned Board meeting. The Board shall review the information and make a decision. The Boards' decision is final.

# STUDY GUIDE FOR TESTING

**About the test:** All questions are multiple choice. Each test has around 100 questions.

The MASBO Board of Directors may review completed application forms which list attendance in classes, workshops or seminars on the topics listed below.

## **A. Recording School Board Minutes – Meeting Agendas**

1. Official documents
2. Publishing minutes
3. Writing minutes
4. Regular, executive session
5. Parliamentary procedures
6. Agendas
7. Other

## **B. School Elections**

1. Trustees, special elections
2. Bond issues, transcripts
3. Mill levies
4. Notices
5. Election calendar
6. Election judges, register, poll books, tally, canvassing votes
7. Ballots
8. Other

## **C. Payroll Management**

1. Withholding
2. Benefits
3. Time sheets
4. Sick leave and vacation records
5. State, Federal Reports
6. Other

## **D. School Finance**

1. Budget compilation and budget management –all funds
2. Compile and monitor revenue sources
  - a. ANB formula
  - b. BASE Funding
  - c. district and county levies
  - d. Federal, state and non-levy sources, etc.
3. Expenditures – proper recording of all financial transactions, account codes
4. State, Federal reporting regulations
5. Debt Service- maturities and debt payments, refunding
6. Special Education – funding, accounting, reporting

7. Tuition
8. Grants - applications, management
9. Emergency budgets and budget amendments
10. Fiscal operations – school accounting procedures
  - a. Generally Accepted Accounting Principles
    - (1) double entry, modified accrual
    - (2) audit procedures
    - (3) reconciliation of internal and external audits
    - (4) internal controls
    - (5) propriety, legality and accuracy of financial transactions
11. Cash Management
  - a. investment of surplus funds
  - b. cash flow charting
  - c. repurchase agreements
12. Financial reporting – monthly, annual
  - a. to Superintendent
  - b. to School Board
  - c. to County Supt., County Treasurer
  - d. to Office of Public Instruction
13. Other

**E. Pupil Transportation**

1. Service – contract/purchase/lease
2. Equipment – standards, inspections, maintenance
3. Bus Drivers
  - a. qualifications, driver certificates
  - b. recruitment
  - c. in-service training
4. Bus routes, school bus loading and unloading zones
5. Bus capacity, eligible transportees
6. Individual transportation contracts
7. County transportation committee, appeals
8. Transportation budget, bus depreciation reserve fund
9. Other

**F. Personnel Management**

1. Fair Labor Standards Act
2. Equal Employment Opportunities Act
3. Negotiations – pertinent fiscal data
4. State/Federal regulations
5. Recruitment, applications, contracts (certified and classified), employment agreements, amendments to contracts
6. Grievances – public hearings
7. In-service training
8. Privacy issues
9. Other

**G. Student Activities**

1. Accounting procedures, state requirements, regulations
2. Activity sponsors
3. Transportation
4. Lodging, meals
5. Credit cards, advanced payments for expenses
6. Student stores
7. Financing
8. District policies, regulations
9. Other

**H. Purchasing and Supplies Management**

1. Centralized/decentralized
2. Requisitions
3. Purchase orders
4. Bid requirements, bid bonds, purchase contract
5. Central stores – receiving and delivery
6. Cooperative purchasing
7. Purchasing policies
8. Local purchases
9. Petty cash
10. Ethics, gifts, privileges
11. Inventories
12. Fixed Asset records
13. Other

**I. School Food Service**

1. Contracting, in-house management
2. Staff recruitment, negotiations
3. Sales – accounting, reporting
4. Reimbursement claims
5. Purchasing
6. Public use of food service facilities/equipment
7. District policies, regulations
8. Other

**J. School Law**

1. Montana statutes and Administrative Rules
2. Federal regulations and laws
3. Other

**K. Risk Management**

1. Insurance – selection: casualty, property, liability, fidelity, workers compensation, unemployment
2. Specifications
3. Insurance bids, request for proposal (RFP), reviewing bids

4. Consulting services
5. Loss claims, records
6. Insurance pools, resident agent
7. Student accident insurance – extra curricular accident insurance
8. Student and staff accident reports/records
9. District policies
10. In-service training
11. Other

**L. Records Management**

1. Permanent documents
2. Student records – pupil accounting / privacy issues
3. Vaults/fire safe storage requirements
4. Filing systems
5. Retention of records
6. Other

**M. Facilities Management**

1. Building maintenance and operation, grounds
2. Staff recruitment – in-service training
3. Public use – rentals, lease, use agreement
4. Surplus property
5. Inspections – safety standards
6. Hazardous materials and wastes
7. Equipment inventory, maintenance
8. Utilities tracking
9. Purchasing standards, policies
10. Handicapped access
11. Plant planning, design, construction
  - a. selection of architects, engineers, consultants
  - b. selection of equipment
  - c. In-house printing, duplication – copyright laws, equipment, policies, priorities
12. Other Functions

**N. Ethics**

See MASBO Ethics Manual

**O. Bonds and Bond Elections**

1. Construction and maintenance contracts – bid bonds, performance bonds, lien waivers, prevailing wage rates, construction insurance, permits, contractors licenses, gross receipts tax

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

## CERTIFICATION APPLICATION AND COURSEWORK DOCUMENTATION

Name \_\_\_\_\_ E-mail \_\_\_\_\_  
 Position \_\_\_\_\_ Phone \_\_\_\_\_  
 Address \_\_\_\_\_ School District \_\_\_\_\_  
 Date of this Application \_\_\_\_\_

**TYPE OF CERTIFICATE REQUESTED**

<b>Business Specialist</b>	AREA _____	NEW (\$15)	RENEW (\$15)
If renewing, enter Certificate Number: _____		Expiration Date: _____	
Attach documentation of 100 continuing education hours.			

<b>Standard Level</b>		NEW (\$15)	RENEW (\$15)
If renewing, enter Certificate Number: _____		Expiration Date: _____	
Attach documentation of 120 continuing education hours.			

<b>Professional Level (circle 1)</b>	Level I (\$25)	Level II (\$25)	Level III (\$25)
*Attach documentation of 120 continuing education hours with the Level 1 request only. Must have 120 hours completed before you can take the Level I test.			

<b>Montana Registered School Business Official</b>	RENEW (\$25)
Attach documentation of 120 continuing education hours.	
Enter Certificate Number: _____	Expiration Date: _____

IF THIS IS AN APPLICATION FOR A NEW CERTIFICATE, applicant shall have his/her Board Chair or Superintendent certify by letter, that he/she is the District Clerk, Business Manager, Business Specialist or a person involved in the business administration/management of Montana school districts. The letter also must include a recommendation regarding the degree of character and integrity, competence and proficiency in his/her assignments and responsibilities. Signature stamps will not be acceptable.

**EXPERIENCE:** Three years required (two years required for Bachelors Degree). (Not necessary to complete for renewal application.)

SCHOOL DISTRICT	POSITION HELD	PERSON TO CONTACT	LENGTH OF EMPLOY
_____	_____	_____	_____
_____	_____	_____	_____

**EDUCATION:** Necessary to complete *only* if applicant has less than the required three years of experience. (Not necessary to complete for renewal application)

SCHOOL ATTENDED	DEGREE AWARDED	MAJOR	MINOR
_____	_____	_____	_____
_____	_____	_____	_____

Attach transcript.

FEES: (must be included with this application)

Business Specialist Application	\$15.00 (new and renewal)
Standard Application	\$15.00 (new and renewal)
Testing Fee	
Level 1	\$25.00
Level 2	\$25.00
Level 3	\$25.00
MRSBO Professional Application	N/A (must have additional 120 continuing education hrs)
MRSBO Renewal	\$25.00 and 120 continuing education hours

Certificates awarded at MCEL - applications must be submitted by October 1st.  
 Certificates awarded at the Annual Summer Conference - applications must be submitted by May 1st.  
 Please include all continuing education credits necessary for the certificate you are applying for.

**MASBO**  
**DOCUMENTATION OF COURSEWORK**  
 Please duplicate this page if more space is needed.

COURSE/WORKSHOP	LOCATION	DATE	CREDIT HRS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<b>Total Hours</b>			_____

The application will be reviewed and evaluated based on the information received. The Executive Director may request such information as is deemed necessary to verify applications. An application for initial certification or for renewal may be denied if MASBO is unable to satisfactorily verify any material representation contained in the application. The MASBO Board of Directors has final approval authority.

All statements made in this application are true. I understand that the certification committee may request Substantiation of any statements made or coursework listed.

Name \_\_\_\_\_  
 (print)

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Date

## Questions and Answers to the New Certification Process

- Q. I have passed level one test and have failed the level two test. Do I have to start over with level one again?
- A. No. As long as you are within the 3 year window, you can retake level 2 as many times as necessary. The thing to watch for is that all three levels must be successfully passed within 3 years.
- Q. I currently have a Professional Level 1 certificate. Can it be renewed?
- A. No. You must go on to take level 2 and then level 3 tests and must show completion of 120 continuing education hours.
- Q. Can I take the tests out of order?
- A. No. You must pass level one then on to level two successfully then onto level 3.
- Q. Can I take all three tests at the same time?
- A. Yes as long as you have received permission from the Executive Director as level 1 will have to be corrected before you can continue on to level 2 and so on. Remember, each level costs \$25.
- Q. I have Professional Level 3. Do I have to retest?
- A. No. You have completed the program and only have to renew your certificate by the due date.
- Q. What good are my Professional Level 1 and 2 certification now?
- A. You are grandfathered into that level now. In other words, if you have a Professional Level 1 then it is considered that you have passed Level 1 test so you only need to pass the level 2 and level 3 tests. If you have a Professional Level 2 then you only need to take the Level 3 test to attain the goal of Montana Registered School Business Official.
- Q. Why is this program going to be better?
- A. The MASBO Board has recognized that the certification program has not been as utilized as it could be. After listening to concerns and ideas about the process, the board revamped the entire program to make it more user friendly. After you have passed a level with specific subject area, you do not have to take it again.
- Q. I have taken level 1 test and level 2 test and am at the end of my 3 year period. If I cannot get the level 3 test taken within the allotted amount of time, do I need to start over?
- A. Yes.
- Q. When does the 3 year time period begin?
- A. The 3 year time clock begins when you take the level 1 test. The intent of the 3 years is from conference to conference so if you start testing at the Summer Conference in 2008, you have until the completion of the Summer Conference of 2011 to finish up your tests.

- Q. I just want my Standard Certificate renewed. Does any of this pertain to me?  
A. No, only to the Professional level.
- Q. Does the original 120 continuing education hours count towards the total 240 continuing education hours that is needed by the time I complete the level 3 test.  
A. Yes. Remember, to start the testing process you must have completed 120 continuing education hours. Then while you are accumulating an additional 120 continuing education hours, you take both level 2 and level 3 tests. At the end of this process you will have attained Montana Registered School Business Official (MRSBO).
- Q. What happens if I take all three tests and don't pass the second test – only the first and third?  
A. This won't happen as if the applicant wants to take all three tests, each level must be scored at 70% or higher in order to proceed to the next level.
- Q. Who comes up with the test questions?  
A. There is a certification committee who make up the questions, answers and reviews and updates the test. This committee meets about 4 times a year so updating is an on-going process.
- Q. What is the test like and how many questions will be on each test?  
A. The test is all multiple choice. Each test has approximately 100 questions.
- Q. Who knows how I did on the test?  
A. The only people that know the results of the test are the MASBO Executive Director and you. Results, pass or fail are by letter to you personally. The outside of the envelope is also marked personal.
- Q. How long does it take to get the results of the test?  
A. Results should be back to you within 60 day of taking the test.
- Q. Am I told or informed of which questions were answered incorrectly?  
A. No. The test questions are not known and/or released to anyone but the test committee itself. If the questions were released, then it would compromise the test. If you fail the test, you are given a list that states how many questions there are in that subject area and how many were incorrect. That is done simply as a courtesy and so you will know where you need to better review before taking the test again.

MASBO will take additional steps to get more recognition and press coverage for you as this is voluntary and shows the worth you put into yourself and your occupation.