

**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 Business Officials (SBO) who are active MASBO members. This program shows the value you have for yourself and your professional career.

## Eligibility

All active MASBO members who meet the requirements and qualifications established by the MASBO Board of Directors shall, upon application, be certified for a period of four years. All certificates expire four years after issuance as long as the applicant remains an active member.

## Procedure

1. Complete a new or renewal application form (see page 12 of this manual). All certificates require renewal with applicable fee and continuing education hours every four years.

2. The MASBO Staff and/or Board may request additional information as necessary to verify the application/renewal. A new or renewal application 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) in the fall or the MASBO Annual Conference in June. Certificates will be mailed to recipients who are unable to attend the conference. The MASBO Executive Director and President, or other MASBO representative will attend a school board meeting to present the MCSBO Certificate.

5. Requirements for continuing education credits and an explanation of the 4-year certification period are explained on page 6.

Questions about this certification program shall be addressed to:

Shelley Turner: [sturner@masbo.com](mailto:sturner@masbo.com) 406-461-3659

or Marie Roach: [mroach@masbo.com](mailto:mroach@masbo.com) 406-461-8804

# TYPES OF CERTIFICATION

The following certificates may be issued by MASBO:

## A. STANDARD CERTIFICATE

The applicant must

- Be employed as a qualified School Business Official (SBO)
- Have 3 years' experience in school finance (2 years with a bachelor's degree in a related field)
- Submit letter from applicant's board chair or superintendent
- Submit documentation of 120 continuing education hours related to the SBO position. Eligible hours honored from 4 years prior to application date.
- Pay the applicable application fee

A standard certificate will expire 4 years from the date of issuance.

Subsequent renewals require a renewal application, an additional 120 continuing education hours from the 4 years prior to renewal application, and applicable renewal fee.

## B. PROFESSIONAL/MONTANA CERTIFIED SCHOOL BUSINESS OFFICIAL CERTIFICATES

Professional certificates include Professional Level I, Professional Level II, Professional Level III, and then Montana Certified School Business Official (MCSBO).

To begin the testing process the applicant must:

- Be employed as a qualified School Business Official (SBO)
- Have 3 years' experience in school finance (2 years with a bachelor's degree in a related field)
- Submit letter from applicant's board chair or superintendent
- Submit documentation of 120 continuing education hours related to the SBO position. Eligible hours honored from 4 years prior to application date.
- Submit a Certification Application
- Pay the applicable application fee

All tests must be scheduled ahead of time with MASBO staff once an approved application is on file. Tests may be taken at MASBO workshops throughout the year and proctored by MASBO Staff or current MCSBO certificate holders. An applicant may also request to take tests at the MASBO Office in East Helena or other testing sites. Testing date and location will be determined by the MASBO Staff. One or more tests may be taken at one sitting, if scheduled and time permits. Applicable test fees must be paid each time a test is taken or retaken.

To pass each test, an applicant must score a 70% or better.

After passing the first test, the member is awarded the Professional Level I Certificate. A certificate will be upgraded for each Professional Level after passing each test without additional cost, other than testing fees. Passing the second test awards the applicant the Professional Level II Certificate and passing the third test awards the application a Professional Level III certificate.

A candidate who fails a test may reschedule, pay the testing fee again, and retake the test.

**All three tests must be passed by June 30 with 70% or better, three (3) years after the fiscal year end in which the first test is passed.** For example, if the first test is passed in FY23 (July 2022-June 2023), the remaining tests must be passed by June 30, 2026. If the testing window expires, the applicant will need to reapply, pay all applicable fees for application and testing, and begin the testing process again.

After passing all 3 tests with 70% or better, the applicant will receive a Professional Level III certificate. The applicant will hold a Professional Level III Certificate with an expiration date 4 years from issuance.

To receive a MCSBO certificate, the applicant must submit an additional 120 continuing education hours to MASBO. Hours must be submitted in less than 12 months from the issue date of the Professional Level III certificate. (i.e. Professional Level III Certificate is dated October 1, 2022. Hours must be submitted by Sept 30, 2023.) If hours are not submitted to MASBO within that time period, testing will need to be completed again with applicable fees.

### **TEST SUBJECT AREAS**

<b>TEST 1:</b> A. Board Agenda/Minutes B. Elections C. Payroll D. Pupil Transportation	<b>TEST 2:</b> E. School Finance F. Personnel Management G. Student Activity Accounting H. Purchasing/Supplies Management I. Food Service	<b>TEST 3</b> J. School Law K. Risk Management L. Records Management M. Facilities Management N. Ethics O. Bond and Bond Elections
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# REQUIREMENTS FOR CERTIFICATION

All applicants for MASBO Certification must meet the following requirements:

- A. **Application** – Applicant must complete the MASBO Certification Application for new or renewal applications. The application form is included herein or under the Professional Development Tab at [www.masbo.com](http://www.masbo.com) .
- B. **Membership** – Applicant must be a current member of the Montana Association of School Business Officials (MASBO) as defined in the association’s by-laws. A certificate may be revoked if membership becomes inactive. If a certificate is issued to an active member, who then becomes an inactive, the certificate will be suspended for a period of 90 days. It is the applicant’s responsibility to notify MASBO staff of membership renewal within the 90 days. If membership has not been reactivated and paid in full within the 90-day period, the certificate will be voided. An active member who leaves their position, can opt to become a “Emeritus” non-district member, pay applicable fees and fulfill all certificate requirements to retain their certificate. The non-district member must submit renewal paperwork, requirements and fees every four years to keep their certificate valid.
- C. **Continuing Education Credits** - Continuing education credit requirements are explained on page 6. Credits must be accrued while the applicant is an active member of MASBO to be considered for certification purposes. It is the applicant’s sole responsibility to track and maintain record of all continuing education hours earned.
- D. **Verification of Business Official** – Applicant shall have his/her Board Chair or Superintendent certify by letter that he/she is a qualified SBO in a Montana school district. The letter must include a recommendation regarding the applicant’s character, integrity, competence and proficiency in his/her assignments and responsibilities. Signature stamps will not be accepted.
- E. **Experience** – Applicant shall have three (3) years’ experience as an SBO in a Montana school district. Applicant needs only two years’ experience if he/she holds a Bachelor’s Degree in a business-related field or administration.
- F. **Fees** – The following fees are due and payable to MASBO with each completed application/renewal form and for each test attempted whether the applicant passes or fail:

- 1. Standard Certificate New and Renewal Application ..... \$25.00
- 2. Professional Level New and Renewal Application ..... \$25.00
- 3. MCSBO Renewal Application ..... \$25.00
- 4. Testing Fees per test, per attempt ..... \$25.00

Fees are non-refundable and are used to defray the cost of operating the certification program. Such fees may be adjusted periodically, as necessary, by the MASBO Board of Directors.

## **To Renew a Certificate**

All certificates expire four years after issuance. For example, a certificate issued on October 1 will expire four years later on September 30. To renew a certificate for a subsequent four-year period, the recipient must submit the application/renewal form, meet the continuing eligibility requirements as established by the MASBO Board, and pay the applicable renewal fee. It is the applicant's sole responsibility to submit renewal paperwork and applicable fees prior to their certificate's expiration date.

## **To Upgrade a Certificate**

A member who holds an unexpired Standard Certificate may upgrade to a professional certificate by:

1. Take and pass a professional level test (tests can be taken in any order).
2. After the applicant passes test I they will receive a Professional Level 1 Certificate; by passing test II, a Professional Level II Certificate will be issued; by passing the third and final test, a Professional Level III Certificate will be issued.
3. Once the first test is passed, the applicant must pass the second and third tests within 3 years following the fiscal year end in which the first test was passed to maintain the professional certificate. For example, if the first test is passed in FY23 (July 2022-June 2023), the remaining tests must be passed by June 30, 2026. Failure to pass all three tests within that time causes the certificate to revert to a Standard Certificate.
4. A holder of a Professional Level III Certificate may upgrade to an MCSBO if he/she has accrued 120 hours of continuing professional education credits in addition to the 120 hours that were needed to begin the testing process. Hours must be submitted to MASBO in less than 12 months from the Professional Level III Certificate issue date.

## **Appeal Process**

In the event an application is not approved by the MASBO Board of Directors, the MASBO Executive Director will notify the applicant, by email, of that decision.

The applicant may appeal the decision by submitting written notification that he/she wishes to appeal and explaining the reason for the 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 the applicant's notice of appeal and any related information to all members of the Board of Directors.

Within 120 days of the date of the original denial notice, the Board will consider the appeal and will notify the applicant in writing of their final decision.

The decision of this Board will be final and further appeal will not be permitted.

# CONTINUING EDUCATION HOURS

Continuing Education Hours may be earned by attending workshops or seminars that are pertinent to the applicant's job duties. It is the applicant's sole responsibility to track and maintain record of all continuing education hours earned. The MASBO [Coursework Log](#) can be used and is found under the Professional Development Tab at [www.masbo.com](http://www.masbo.com). Hours for an initial application must be earned within the 4 years prior to the application due date, except for college credits. Hours for renewal are valid only in the period they are earned, and excess hours may not be carried over into the next renewal period.

## **Presenter Credit**

A presenter at an approved workshop, session or webinar shall receive 2 hours for each 1 hour of presentation (i.e., a one-hour session = 2 hours earned). Any number of repeat presentations on the same day are also eligible for presenter credit. For example, three 1-hour presentations on the same day would equal 6 hours earned).

## **Officer and Director Credit**

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

## **MASBO Committee Chairs and Members**

Committee Chairs may receive 8 hours for each year served in active committee leadership, as verified by the MASBO Board.

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, as verified by the Committee Chair.

## **Mentor Credit**

MASBO Mentors may receive 4 hours for each year served.

## **College Credit**

College credits more than 4 years old are acceptable for an initial application only. 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

Prior to MASBO approving an application for certification, the Executive Board of MASBO may audit the application. The applicant under audit will be asked to provide to the Board the supporting documentation for the hours claimed and any other information requested.

If hours submitted for an initial or renewal application are not deemed acceptable, the applicant may appeal the decision to the MASBO Board. The Board's decision is final.



Approved Conferences include (but are not limited to) workshops, sessions and webinars sponsored by:

Association of School Business Officials International (ASBO)

Montana Association of School Business Officials (MASBO)

Montana School Boards Association (MTSBA)

Montana Office of Public Instruction (OPI)

Montana Schools Unified Insurance Authority (MTSUIP)

Montana Schools Insurance Group Authority (MSGIA)

School Administrators of Montana (SAM)

Other Montana educational organization or governmental agencies involved with schools

Other university or vocational technical courses related to school finance

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.

## **REVOCAION OF CERTIFICATE**

A MASBO Certificate may be revoked by the MASBO Board of Directors. The Board's decision to revoke a certificate may result from such things as the applicant providing false or misleading information in the application process that the Board relied on to grant the certificate or the certificate holder being convicted of a crime relevant to the character or competency to practice his or her profession.

An individual whose certificate is being considered for revocation will be notified in writing of the Board's reason for considering revocation at least forty-five (45) days before the planned date of final Board action.

The registrant shall have the right to appeal the possible revocation by submitting written notification to the Executive Director explaining the appeal. Such notice must 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 decide. The Boards' decision is final.

Applicant must be a current member of the Montana Association of School Business Officials (MASBO) as defined in the association's by-laws. A certificate may be revoked if membership becomes inactive. If a certificate is issued to an active member, who then becomes an inactive, the certificate will be suspended for a period of 90 days. It is the applicant's responsibility to notify MASBO staff of membership renewal within the 90 days. If membership has not been reactivated and paid in full within the 90-day period, the certificate will be voided

If the inactive member transfers employments to another Montana school district and re-establishes MASBO membership within 90 days from becoming inactive and has paid membership dues, they must notify MASBO or the certificate becomes void. . An active member who leaves their position, can opt to become an "Emeritus" non-district member, pay applicable fees and fulfill all certificate requirements to retain their certificate. The non-district member must submit renewal paperwork, requirements and fees every four years to keep their certificate valid.

# STUDY GUIDE FOR TESTING

Study Guides can be found on the MASBO website at the bottom of the Certification page under the Professional Development Tab: [Certification](#)

**About the tests:** All questions are multiple choice. Each test has approximately 80-90 questions.

Test questions may include, but are not limited to the topics listed in the subject areas below.

## TEST 1:

### 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

### 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

### C. Payroll Management

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

### D. Pupil Transportation

1. Service – contract/purchase/lease
2. Equipment – standards, inspections, maintenance
3. Bus Drivers - Qualifications, driver certificates, recruitment, 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

## TEST 2 :

### E. School Finance

1. Budget compilation and budget management –all funds
2. Compile and monitor revenue sources - ANB formula, BASE Funding, district and county levies, 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 - investment of surplus funds, cash flow charting, repurchase agreements
12. Financial reporting – monthly, annual - to Superintendent, to School Board, . to County Supt., to County Treasurer, to Office of Public Instruction

### 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

### 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

## **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

## **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

## **TEST 3:**

### **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 – extracurricular 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

**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

**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

Name: \_\_\_\_\_  
District & Title: \_\_\_\_\_  
New or Renewal Certification Application: \_\_\_\_\_  
Type of Certificate Requested: \_\_\_\_\_



## Certification Types

### Standard Certificate

1. 3 years of experience in School Finance or 2 years with Bachelor's Degree in related field
2. Documentation of 120 continuing education hours for new application or renewal every 4 years
3. Letter from Board Chair or Superintendent
4. Active MASBO Member
5. \$25 new application or renewal fee

### Professional Level/Montana Certified School Business Official (MCSBO)

1. 3 years of experience in School Finance or 2 years with Bachelor's Degree in related field
2. Documentation of 120 continuing education hours with new application or renewal every 4 years
3. Letter from Board Chair or Superintendent
4. Active MASBO Member
5. \$25 new application fee or renewal fee
6. \$25 testing fee each time applicant tests
  - a. With an approved application, an applicant may start testing to earn each of three Professional Level Certificates
  - b. Applicant must pass the 3 tests within 3 years from the date the first test was passed. Once tests are passed and an additional 120 hours of continuing education are submitted, a MCSBO Certificate may be awarded

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## Requirements to Apply:

**Experience/Education:** Three years of experience are required, or two years with a Bachelor's Degree

District Name \_\_\_\_\_ Start – End Date \_\_\_\_\_

District Name \_\_\_\_\_ Start – End Date \_\_\_\_\_

With two years' experience, attach college transcript. School Attended: \_\_\_\_\_

**Continuing Education Hours:** Documentation of 120 Continuing Education Hours are required for all new and renewal applications. Attached list of hours including workshop name, location, date and credit hours for each. [Coursework Log](#)

**Letter from Board Chair/Superintendent:** Include a letter from the Board Chair or Superintendent certifying that the applicant is a School Business Official in a Montana school district. The letter must also include a recommendation regarding the degree of character, integrity, competence and proficiency in the applicant's assignments and responsibilities. Original signature is required on the letter, and signature stamps will not be accepted.

Please see [Certification Manual](#) for more information.

This application will be evaluated based on the information received. An application may be denied if MASBO is unable to adequately verify any information 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 MASBO Certification Committee, MASBO Board or MASBO Staff may request documentation to substantiate any information in the application.

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## Applicant Signature and Date

Office Use Only:

Experience Requirement Met \_\_\_\_\_ Continuing Education Hours Received \_\_\_\_\_

Board/Supt Letter Received \_\_\_\_\_ Application Fee Received \_\_\_\_\_

MASBO Board Approval Date \_\_\_\_\_

## Questions and Answers about the MASBO Certification Process

- Q. I passed Test 1 and have failed Test 2. Do I have to start over with Test 1 again?  
A. No, you can retake a test as many times as necessary.
- Q. I currently have a Professional Level I Certificate. Can it be renewed?  
A. No, the Professional Level certificates are part of the MCSBO Certification process and can't be renewed.
- Q. Can I take the tests out of order?  
A. Yes.
- Q. Can I take all three tests at the same time?  
A. Yes, you can make arrangements with MASBO staff and pay \$25 for each test you take .
- Q. I have a Professional Level III Certificate. Do I have to retest?  
A. No, you have completed the testing program. As long as you submit the additional 120 hours required prior to 12 months from the Professional Level III Certificate date, your certificate can be upgraded to the MCSBO Certificate.
- Q. I have taken test 1 and test 2 and I am at the end of my 3-year period. If I cannot pass the third test within the allotted time, do I need to start over?  
A. Yes.
- Q. When does the 3-year time period begin?  
A. The 3-year testing period begins when you pass the first test. After passing the first test, the applicant must pass test 2 and test 3 within 3 years following the fiscal year end in which the first test is passed. For example, the first test is passed in FY23 (anytime between July 1, 2022 and June 30, 2023). All three tests must be passed by June 30, 2026.
- Q. I just want my Standard Certificate renewed. Does testing pertain to me?  
A. No.
- Q. Does the original 120 continuing education hours count towards the total 240 continuing education hours that is needed by the time I pass the third test?  
A. Yes. To start the testing process, you must have completed 120 continuing education hours. Then while you are testing, an additional 120 continuing education hours are required.
- Q. Who writes the test questions?  
A. The MASBO Certification Committee writes, validates and updates tests.
- 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 80-100 questions.
- Q. Who knows how I did on the test?  
A. The only people who know the results of the test are the MASBO Staff and you.
- Q. How long does it take to get the results of the test?  
A. Results are given as soon as possible; usually within 24 hours.
- Q. Am I told or informed of which questions were answered incorrectly?  
A. No. In order to preserve the validity of the test questions, the questions are not released to anyone except the Certification Committee. We can tell you which test subject areas you may want to review before taking the test again.