

**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, district clerks, and specialists eligible for active MASBO membership. This program shows the value you have for yourself and your professional career.

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 Certified School Business Official Certificate. Testing is not required for the Standard Certificate or Business Specialist Certificate.

Procedure

1. Complete an application/renewal form (see page 12 of this manual).
2. Submit your application on or before September 30 to receive or renew your certificate as of October 1 (MCEL Conference) or on or before May 31 to receive or renew your certificate as of June 1 (MASBO Summer Conference).
3. The Executive Director may request additional information as necessary to verify the application/renewal. An application for initial certification or 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) in the fall or the MASBO Summer Conference. 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. A press release will be sent to the recipient's local newspaper and to the district for publication or posting on its website.
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 or clarification of requirements shall be addressed to:

M A S B O
P.O. Box 400
East Helena, MT 59635
dwilliams@masbo.com
(406) 461-3659
www.masbo.com

TYPES OF CERTIFICATION

The following certificates may be issued by MASBO:

A. BUSINESS SPECIALIST CERTIFICATE

The applicant must 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 include Personnel Management, Risk Management, Purchasing/Supplies Management, Payroll, Facilities Management, and School Finance. Other areas of specialty may be considered for MASBO Board approval based on written request to the MASBO Board of Directors.

This certificate requires 100 hours of continuing education credits for an initial or renewal certificate, of which at least 90 hours shall be in the area of specialization. Eligible hours will be honored from the 4 years prior to the application/renewal form deadline.

B. STANDARD CERTIFICATE

The applicant must be employed as a district clerk and/or business manager attend a curriculum of coursework related to their position. No test is required for the Standard Certificate

This certificate requires 120 hours of continuing education credits for an initial or renewal certificate. Eligible hours will be honored from the 4 years prior to the application/renewal form deadline.

C. PROFESSIONAL CERTIFICATES

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

To achieve the level of MCSBO, an applicant must: 1) attend and complete 120 hours of a curriculum of coursework related to the position of district clerk/business manager, 2) within a three-year period achieve at least a 70% on 3 tests designed to show proficiency at the subject area of testing, and 3) complete 120 hours of additional coursework. The applicant must maintain current active membership status during the testing process.

To begin the testing process, the applicant must submit an application form documenting the completion of 120 continuing education hours related to the position of district clerk/business manager. Eligible hours will be honored from the 4 years prior to the application date.

After applying by May 31 or September 30, applicants may take tests at the MASBO Summer Conference in June or the Montana Conference of Educational

Leadership (MCEL) in October. One or more tests may be taken at one sitting, as time permits. An applicant may also request to take the test at the MASBO Office in Helena or other testing site. Testing date and location will be determined by the Executive Director.

A candidate who fails a test may apply to retake the test and must pay the testing fee again. All 3 tests must be passed by June 30 three (3) years after the fiscal year end in which the first test is passed. For example, if the first test is passed in February 2013, the remaining tests must be passed by June 30, 2017. Once the testing process expires, the applicant must retake all tests.

After passing the first test, the member is awarded the Professional Level I Certificate. Passing the second test awards the applicant the Professional Level II Certificate.

It is possible to pass the third and final test before 120 continuing education credits are obtained. In this case, the applicant will be awarded a Professional Level III Certificate. After passing all 3 tests and documenting the completion of an additional 120 continuing education hours (i.e., in addition to the 120 hours required for the initial testing application - 240 total), the applicant will be awarded the Montana Certified School Business Official (MCSBO) Certificate.

Until achieving the MCSBO Certificate, certification is renewed every 4 years at the same cost as the Standard Certificate or the Business Specialist Certificate. A certificate will be upgraded for each Professional Level after passing each test without additional cost, other than testing fees. Certificate expiration/renewal remains on the same 4 year schedule, regardless of whether the certificate holder is pursuing the testing process or not.

Once the certificate is upgraded to a Montana Certified School Business Official Certificate, subsequent renewals require 120 continuing education hours over a four year period at the renewal cost for MCSBO Certificate.

Testing Subject Areas

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

Test 2 – Testing will be in the following subject areas*: D, F, G, H, I,

Test 3 – Testing will be in the following subject areas*: J, K, L, M, N, O

***SUBJECT AREAS**

A. Board Agenda/Minutes B. Elections C. Payroll E. Pupil Transportation	D. School Finance 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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REQUIREMENTS FOR CERTIFICATION

All applicants for MASBO Certification must meet the following requirements:

- A. Application – Applicant must complete the official application/renewal form provided by the MASBO office. The application form is included herein or on the MASBO website at www.masbo.com and may be duplicated.
- B. Membership – Applicant must be an active member of the Montana Association of School Business Officials (MASBO) as defined in the association’s by-laws.
- 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.
- D. Verification of Business Official – 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 or management of 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 the District Clerk, Business Manager, Business Specialist, or a person involved in the business administration or management of 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:

1. Application fee for a Business Specialist Certificate.....	\$15.00
2. Application fee for a Standard Certificate	\$15.00
3. Application fee for testing for an MCSBO Certificate.....	N/A
4. Testing Fees	\$25.00 / test
5. Renewal of Certification	
Business Specialist or Standard.....	\$15.00
MCSBO	\$25.00
6. Late Renewal Fee	\$15.00

An additional \$15 late fee will be charged for renewing a certificate up to one year after the expiration date. After one year, full retesting is required to regain the status of Montana Certified School Business Official.

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

Certificates issued on June 1 will expire four years later on May 31. 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.

To Upgrade a Certificate

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

- 1) Taking one or more professional level tests while maintaining active membership and current certification (i.e., renewing active membership and certification in a timely manner); and
- 2) Passing the first test to upgrade to a Professional Level I Certificate, passing a second test to upgrade to a Professional Level II Certificate, and passing a third test to upgrade to a Professional Level III Certificate;
- 3) After passing the first test, the member must pass the second and third tests within 3 years following the fiscal year end in which the first test is passed to maintain the professional certificate. Failure to pass all three tests within that time causes the certificate to revert to a Standard Certificate or Business Specialist 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.

Please see fee schedule for applicable certification renewal fees.

Appeal Process

In the event an application is not approved by the MASBO Board of Directors, the Board will notify the applicant, in writing, 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 and participating in workshops or seminars that are pertinent to the applicant's job duties. Hours for an initial application must be earned within the 4 years prior to the application due date (May 1 or September 1), 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.

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.

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

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), Montana Schools Unified Insurance Authority (MTSUIP), Montana Schools Insurance Group Authority (MSGIA), 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). 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. A mentorship assignment requires at least 8 hours of involvement per year, as verified by the regional director.

College Credit

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

REVOCATION 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 make a decision. The Boards' decision is final.

STUDY GUIDE FOR TESTING

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

Test questions may cover topics listed in the subject areas 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 – 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
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

Letter from Board Chair/Superintendent (initial application only): An initial application for certification must include a letter from the Board Chair or Superintendent certifying that the applicant is the District Clerk, Business Manager, Business Specialist or a person involved in the business administration or management of Montana school districts. The letter must also include a recommendation regarding the degree of character and 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.

EXPERIENCE: (initial application only)

Three years of experience are required (or two years with a Bachelor's Degree – complete the education section below).

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

EDUCATION: (initial application only)

Complete this section only if applicant has less than three years of experience.

SCHOOL ATTENDED	DEGREE EARNED (Attach transcript)	MAJOR	MINOR
_____	_____	_____	_____
_____	_____	_____	_____

FEES:

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

Submit this form to MASBO:

by September 30 -- Certificates awarded and tests taken at MCEL Conference in October.
 by May 31 -- Certificates awarded and test taken at the MASBO Summer Conference in June.
 Note: On request, tests may be given at another time and location determined by the Executive Director.

Please use the section below to list all continuing education hours required for the certificate you are applying for.

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

COURSE/WORKSHOP	LOCATION	DATE	CREDIT HRS (Within prior 4 years)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Hours			_____

This application will be reviewed and evaluated based on the information received. The Executive Director may request any information needed to verify the application. An application for initial certification or for renewal may be denied if MASBO is unable to adequately 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 MASBO Certification Committee or Executive Director may request documentation to substantiate any statements made or coursework listed.

Name _____
 (Print)

 Signature

 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. Keep in mind that all three levels must be successfully passed within 3 years after the fiscal year in which you pass the first test.
- 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 don't require renewal.
- Q. Can I take the tests out of order?
- A. Yes.
- Q. Can I take all three tests at the same time?
- A. Yes, as long as you have made arrangements with the Executive Director. Remember each level costs \$25.
- Q. I have a Professional Level III Certificate. Do I have to retest?
- A. No. You have completed the testing program. You can submit 120 additional hours and request your MCSBO Certificate.
- Q. I have taken the first and second tests 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 time clock begins when you pass the first test. Since the tests are given twice a year at major conferences, applicants are encouraged to take a test every 6 months or at least annually to maintain momentum and pass all tests within the 3 year period.
- Q. I just want my Standard Certificate renewed. Does testing pertain to me?
- A. No, testing only pertains to the MCSBO Certificate.
- 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. Remember, to start the testing process you must have completed 120 continuing education hours in a course of curriculum related to the clerk/business manager position. Then while you are accumulating an additional 120 continuing education hours, you take (and pass) the 3 tests. At the end of this process you will have attained a Montana Certified School Business Official (MCSBO) Certificate.

- Q. Who writes the test questions?
A. The MASBO Certification Committee writes test questions, validates the answers and reviews and updates the tests. This committee reviews the test questions annually.
- 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 who know the results of the test are the MASBO Executive Director, MASBO Administrative Assistant and you.
- Q. How long does it take to get the results of the test?
A. Results are given as soon as possible.
- 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.