# Maine Association of School Business Officials
## School Business Official III - Certification Checklist

### A Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Completed</th>
<th>Needs</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>Bachelor’s Degree</td>
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<tr>
<td>Business / Finance Classes - 18 credit hours</td>
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<td>Portfolio *</td>
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### B Course Descriptions

1. **Introduction to School Business** (14 contact hrs)
   - Federal & State Reports
   - Fund Accounting Processes
   - School Organizational & Operational Issues (Boards)
   - Inter-relationships (schools, facilities, transportation, lunch)
   - Roles & Functions of School Business Official

2. **Bonding/Borrowing/Investing** (3 contact hrs)
   - Bond, Borrow and Investing Funds
   - Cash Flow Analysis
   - Arbitrage, Borrowing and Investing Options

3. **Cash Management** (3 contact hrs)
   - Selecting Banking and Other Financial Services
   - Compensating Balances
   - Cash Collection and Disbursement
   - Internal Transfers and Loans
   - Cash Flow Analysis

4. **Facilities for the Business Manager** (3 contact hrs)
   - Building and Grounds Maintenance Operations
   - School Construction Laws
   - Environmental Laws and Regulations
   - Planning Maintenance Programs
   - What to Expect from a Facilities Manager/Director

5. **Food Services for Business Manager** (3 contact hrs)
   - Structure and Function of Food Services Program
   - Food Safety Issues
   - Vending and Contracting for Food Services
   - Cooperative Ventures

6. **Introduction to Ethical Principles and Decision Making** (3 contact hours)
   - Organizational Ethics
   - Black and White and then Gray
   - Ethical Issues/Dilemmas; How to Handle
   - How to Establish an Ethics Program

7. **Instructional Program Evaluation** (3 contact hrs)
   - Understand Components of Instructional Programs
   - Planning and Implementing Program Improvement
   - Analyzing Economic Factors with Delivering/Evaluating Instructional Programs
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<th>Evaluators:</th>
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**Develop Procedures for Cost-Effectiveness**

**Use of Evaluation Data toward changes in Instructional Programs**

**Allocate Resources to Improve Programs**

**8 Insurance and Risk Management (3 contact hrs)**

- Workers’ Compensation
- Cafeteria Plans
- Property/Casualty and Liability
- Health Insurance
- Errors and Omissions
- Methods of Risk Management

**9 Labor Relations/ Employment Law (6 contact hrs)**

- Collective Bargaining
- Wage and Hour
- Discrimination, COBRA, FMLA
- Federal & State Retirement Issues

**10 Payroll & Related Personnel Issues (3 contact hrs)**

- State and Federal Payroll Laws and Regulations
- Tax Regulations
- Employee Retirement Plans
- Aspects of Completing Payroll and Direct Deposits

**11 Principles of Education (3 contact hrs)**

- Educational Process
- Culture of Schools and Learning Theories
- Teaching Methodologies
- School Improvement
- In-Service Programs
- Structure and Function of the Principalship

**12 Effective Communications (3 contact hrs)**

- Techniques to Send Clear Messages
- Create Credibility
- How to Use Body Language Effectively
- Listen for Understanding

**13 Purchasing (3 contact hrs)**

- Basics of Purchasing Function
- Structure of Purchasing Operation
- Electronic and Cooperative Purchasing
- Bidding, Reviewing Contracts, Lease-Purchases

**14 Revenue, Expenditures and Budgeting (9 contact hrs)**

- School Revenue and Transfer Sources
- Process and Structure of Budgets and Expenditures
- Essentials Programs and Services (State Aid)
- Federal and State Programs

**15 Audit (3 contact hours)**
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- Preparation for Auditors
- Basic Financial Statements Required
- M D & A Findings - Significant and Others and How to Correct
- GAAP vs Budgeting Basics
- Single Audits

### 16 Strategic Planning (3 contact hrs)
- Identification of District's Short- and Long-Term Goals
- Explore Opportunities for your District
- Developing a Strategic Plan to Achieve Mission and Goals

### 17 Team Leadership (3 contact hrs)
- Leadership in General
- Methods of Challenges of Managing People
- Recruiting, Training, Motivating and Evaluating Staff

### 18 Technology for the Business Manager (3 contact hrs)
- Development of Staff Training in Technology
- Long-Range Planning for School District
- Technology Infrastructure and Evaluating Cost Benefits
- Ensuring Appropriate Security

### 19 Transportation for the Business Manager (3 contact hrs)
- Basic Structure and Function of Transportation Dept
- Equipment Supply and Purchase
- Transportation Laws

### 20 Wrap-up (2 contact hrs)
- Review Content Areas, Provide References, Reflection

Total Class Time: 79 contact hours
Continuing Education contact hours are 100 within 5 yrs (up to 9 contact hours can be received for teaching)

When you complete any of the above requirements, please submit the documentation to this office. Please send only official transcripts for college courses.

### For PDC use only:

- Number of Courses that are Completed:
- Number of Courses that are Needed:

* Portfolio - A portfolio provides evidence of accomplishments, skills, abilities and it documents the scope and quality of a person's experience and training.