

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

Name:		Date:	Evaluators:
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A Requirements	Completed	Needs	Comments
Bachelor's Degree			
Business / Finance Classes - 18 credit hours			
Portfolio *			

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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	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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Name:		Date:		Evaluators:
	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 Manger (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.