

# **The Pennsylvania Association of School Business Officials**

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## **Professional Certification Guide**



**PCSBA**

**PCSBO**

**PCSBS**

Published by  
Pennsylvania Association of School Business Officials  
2608 Market Place, Harrisburg, PA 17110  
Phone (717) 540-9551 ~ [www.pasbo.org](http://www.pasbo.org)

Revised July 2018



# PROFESSIONAL CERTIFICATION GUIDE

## FOREWORD

In 1984, recognizing the important role of the school business official in the operation of schools in the Commonwealth and also recognizing the lack of statewide minimum standards for professional development requirements, the PASBO Board of Directors developed the Professional Registration Program. The program specifies minimum education and experience standards to meet initial registration requirements and requires continued satisfactory experience and participation in professional development programs for renewal of the registration on a four-year cycle.

Since its inception, the PASBO Professional Registration Program has gained wide acceptance in the education community. The program has been endorsed or supported by the Pennsylvania Department of Education, the Pennsylvania School Boards Association, the Pennsylvania Association of School Administrators, the Pennsylvania Association of Intermediate Units, the Pennsylvania Association of Elementary and Secondary School Principals.

The PASBO Board of Directors completed an extensive review of the program in 2002 and contracted with a national credentialing consultant to assist in program updates. The Professional Registration Committee, working in concert with Mickie S. Rops & Associates, formulated the improvements necessary to enhance and add value to the program. The two key changes adopted by the PASBO Board of Directors were to develop Certificates of Enhanced Qualifications (CEQs) that would be an alternative path for meeting the Areas of Specialization requirement and authorize years of active school business experience to supplement the formal education requirement. Areas of Specialization were also reevaluated and modified to reflect the school environment of the 21<sup>st</sup> Century. In addition, policy changes addressed system-wide versus secondary areas of responsibilities, change of position and change of membership type.

In 2017-2018, as part of the strategic planning process, the Professional Registration Committee made several recommendations that were adopted by the Board, effective July 1, 2018. The changes included changing the name from “registration” to “certification.” The Committee suggested this change for the following reasons: (a) certification better describes the level of rigor required for the program and better reflects the purpose of the program, (b) it implies that more than “signing-up” is required, (c) it makes it easier to identify the purpose of the program for PASBO and non-PASBO members, (d) the name holds more significance, and (e) may attract new participants. Additional changes were made to enhance rigor in the program, streamline and/or clarify the activities for CEUs, simplify the renewal process, and recognize longevity of service to PASBO.

Special thanks are extended to the members of this committee, present and past, for their dedication and leadership in advising the PASBO Board of Directors in the policies and administration of the Professional Certification Program.



Jay Himes, CAE  
PASBO Executive Director

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## **SECTION I: PROGRAM DESCRIPTION**

### **Purpose**

The Pennsylvania Association of School Business Officials (PASBO) has developed this voluntary program of professional certification and continuing education in order to provide a recognized standard of competence for school business administrators, officials, and specialists eligible for PASBO active and life membership.

### **Objectives**

The objectives of the PASBO Professional Certification Program include:

- 1) To raise the professional standards of those school administrators who have responsibilities for non-instructional services and programs;
- 2) To improve school business management practices by encouraging school business officials to develop and to implement a continuing program of personal professional development;
- 3) To identify those persons with administrative and supervisory responsibilities in school business functions who have demonstrated competence and have fulfilled prescribed standards of performance and conduct, and
- 4) To award special recognition to school business officials who meet the initial and renewal criteria for professional certification.

### **Policies**

The PASBO Board of Directors shall adopt policies governing the administration of the Professional Certification Program. Such policies shall be developed by the Professional Certification Committee in conjunction with the Executive Director and presented to the Board of Directors for action. New and revised policies adopted in relation to the Professional Certification Program shall be made available to the PASBO membership. A copy of the current policies are available on request.

The Executive Director of PASBO or his or her designee shall administer the program within the policies established by the PASBO Board of Directors.

### **Professional Certification Committee**

The Professional Certification Committee shall be appointed by and be advisory to the PASBO Board of Directors. This committee shall consist of at least nine active or life members of PASBO appointed to serve for overlapping three-year terms. Members shall be certified under the program to serve on this committee.

### **Eligibility**

Upon application, all members who meet the standards and qualifications established by the PASBO Board of Directors shall be registered for a four-year period. To renew the designated certification for subsequent four-year periods, the recipient shall meet the continuing eligibility requirements.

## Procedures

- All applications will be reviewed and evaluated by the Executive Director.
- The Executive Director will make recommendations of the applications for approval or denial to the PASBO Board of Directors at their next available meeting. All applicants will be notified by email prior to the meeting. The PASBO Board of Directors generally meets four times annually.
- The process for approval, denial and appeal of applications is as follows:

**Approval** – All applicants approved by the PASBO Board of Directors will be notified by mail shortly after the meeting. Certificates will be forwarded to the chief school administrators indicated in the applications for presentation at an appropriate time.

**Denial and Appeal Process** – In the event an application is not approved by the Executive Director or the PASBO Board of Directors, the applicant will be notified in writing of that determination by the Executive Director. The applicant shall have the right to appeal the decision of the Executive Director by written notification that he/she wishes to appeal. Such notice shall be received by the Executive Director within 30 days from the date of the original notification. All documentation supporting the appeal shall be received by the Executive Director within 60 days of the original notification. The Executive Director shall forward all relevant data to the Appeals Committee. All appeals will be reviewed by the Appeals Committee comprised of members of the Professional Certification Committee and others appointed by the chairperson. The decision of the Appeals Committee will not be subject to further appeal. The entire appeals process shall be completed within 120 days of the original denial notice.

NOTE: Information provided as part of the application for professional certification or subsequent renewal shall be used solely for the purpose of evaluating the qualifications of the applicant for a professional certification.

## Revocation of Certification

A professional certification may be revoked by the PASBO Board of Directors. Revocations of a professional certification may arise from falsification or misrepresentation of information relied upon to grant the certification or conviction of a crime relevant to the character or competency of an individual to practice his or her profession.

An individual whose certification is to be revoked will be informed in writing by the Executive Director of the reasons for such revocation at least 60 days prior to the planned date of Board action. The member shall have the right to appeal the decision to revoke the certification by written notification to the Executive Director of the intent to appeal. Such notice shall be received by the Executive Director within 30 days from the date of the original notification. All documentation supporting the appeal shall be received by the Executive Director within 60 days of the original notification. The Executive Director shall forward all relevant data to the Appeals Committee of the Professional Certification Committee. The Appeals Committee shall review the information presented and if necessary interview the member. The Appeals Committee shall recommend to the Board of Directors whether or not to revoke the certification.

### **Conditions for a Successful Application**

- Applicants shall apply for the highest designation for which they qualify.
- Members may hold only one certification designation at a time.
- **NEW!** All applicants renewing at their previous certification designation are required to only submit an application, payment, and list of CEUs claimed. Additional documentation for CEUs is only necessary for non-PASBO events.

**Certification Forms** – The Professional Certification Application including a Schedule for Reporting Continuing Education Units (CEUs) is in Appendix C or may be downloaded from the PASBO web site at [www.pasbo.org/profcert](http://www.pasbo.org/profcert).

**Questions** – Questions about the Professional Certification program should be directed to the Executive Director, Pennsylvania Association of School Business Officials, 2608 Market Place, Harrisburg, Pennsylvania 17110, (717) 540-9551.

## REQUIREMENTS FOR INITIAL CERTIFICATION

All applicants for initial certification under the PASBO Professional Certification Program shall meet the following requirements:

**Application** – Applicant shall complete the Application for Certified status provided by the PASBO office.

**Membership** – Applicant shall be and have been a current “Active” or “Life” member of PASBO for the immediate three years prior to application. Membership in PASBO shall be determined according to policies adopted by the PASBO Board of Directors.

**Continuing Education Units (CEUs)** – Applicant shall, during the prior three-year period, earn the number of CEUs indicated below. No more than 75% of the total CEUs reported shall qualify as Type 1, Conferences and Group Programs. Further description of CEU requirements are described under each particular designation. It is the applicant’s responsibility to maintain and track his or her CEUs.

**PCSBA = 48**

**PCSBO = 24**

**PCSBS = 12**

**Job Description and Organization Chart** – Applicant shall submit the employing governing board's approved job description for his/her position and the approved administrative organization chart with his/her official application.

**Verification of Chief School Administrator** – Applicant shall have his/her Chief School Administrator certify on the application that he/she is either the chief business officer, a business official or a specialist in the school entity, that the areas of responsibility are accurately checked, that other information on the application is accurate, that the applicant is known to possess a high degree of character and integrity and has demonstrated competence and proficiency in his/her assignments and responsibilities. If the signature of the chief school administrator cannot be obtained, the applicant should submit the application with an explanation of the circumstances.

**Fees** – All applications for certification shall be accompanied by a check or credit card for the appropriate fee, which at the time of publication was \$50. This fee is non-refundable and defrays the cost of operating the program. Such fees may be adjusted periodically by the PASBO Board of Directors.

**Specific Certification Requirements** – In addition to the above requirements, each applicant for certified status shall meet certain unique requirements. There are three levels of certification available under this program. The level of certification for which a business official will qualify is determined by consideration of a combination of factors including experience, educational background, and continuing education. The three levels of certification are PCSBA, PCSBO and PCSBS. In order to qualify for a level of certification, applicants shall meet the following requirements.



## **PENNSYLVANIA CERTIFIED SCHOOL BUSINESS ADMINISTRATOR (PCSBA)**

**Experience** – Applicant shall have three years of experience during the last five years in at least six areas of specialization in a system-wide administrative position. *In order to claim an area of specialization an applicant shall manage, supervise or perform three or more functions in such a way as to encompass all aspects of the task for a school entity within a specific area of specialization as shown in Section III.*

**Educational Background** – Applicant shall have (1) earned a Master's Degree or Master's Equivalent (as defined by the Pennsylvania Department of Education) or (2) earned a Bachelor's Degree and have completed four years of experience in at least six areas of specialization, or (3) have earned a Bachelor's Degree and have three years of work experience in six areas of specialization and at least nine graduate credits above the Bachelor's Degree. Graduate school transcripts shall be provided when claiming a combination of course credit and work experience to satisfy the educational requirement.

**Continuing Education Units** – Applicant shall have earned a minimum of 48 CEUs in the field of school business administration within the immediate three years prior to application.

## **PENNSYLVANIA CERTIFIED SCHOOL BUSINESS OFFICIAL (PCSBO)**

**Experience** – Applicant shall have three years of experience during the last five years in at least three areas of specialization in a system-wide administrative position. *In order to claim an area of specialization an applicant shall manage, supervise or perform three or more functions in such a way as to encompass all aspects of the task for a school entity within a specific area of specialization as shown in Section III.*

**Educational Background** – Applicant shall have (1) earned a Bachelor's Degree or (2) earned an Associate's Degree and have at least six years of work experience in at least three areas of specialization or (3) earned an Associate's Degree, have at least three years of work experience in three areas of specialization and have earned at least 45 college credits beyond the Associate's Degree. College transcripts shall be provided when claiming a combination of course credit and work experience to satisfy the educational requirement.

**Continuing Education Units** – Applicant shall have earned a minimum of 24 CEUs within the immediate three years prior to application.

## **PENNSYLVANIA CERTIFIED SCHOOL BUSINESS SPECIALIST (PCSBS)**

**Experience** – Applicant shall have three years of experience during the last five years in at least one area of specialization in a system-wide administrative position. *In order to claim an area of specialization an applicant shall manage, supervise or perform three or more functions in such a way as to encompass all aspects of the task for a school entity within a specific area of specialization as shown in Section III.*

**Educational Background** – Applicant shall have a High School Diploma or equivalent.

**Continuing Education Units** – Applicant shall have completed a minimum of 12 CEUs within the immediate three years prior to application.

## REQUIREMENTS FOR RENEWAL OF CERTIFICATION

Each certification shall be valid for a period of four years from the date granted. Members will be notified by the PASBO office, one year and one month prior to the expiration of the certification, of the need to renew the certification. Renewal applications will only be accepted during the seven months prior to the expiration date of the current certification. In order to retain this certification, the member shall complete specified renewal requirements as listed below.

**Application** – Applicant shall complete the Application for Certified status provided by the PASBO office.

**Membership** – Applicant shall retain “Active” or “Life” membership in PASBO during all years of certification.

**Continuing Education Units (CEUs)** – Applicant shall, during the previous four-year certification period, earn the number of CEUs indicated below. No more than 75% of the total CEUs reported shall qualify as Type 1, Conferences and Group Programs. Applicants may begin to earn CEUs towards successive certification renewals during the month of the certification expiration/anniversary date; however, dual credit for the month is prohibited. It is the applicant’s responsibility to maintain and track his or her CEUs.

**PCSBA = 64**

**PCSBO = 32**

**PCSBS = 16**

**Fees** – All applications for renewal certification shall be accompanied by a check or credit card for the appropriate fee, which at the time of publication was \$50. This fee is non-refundable and defrays the cost of operating the program. Such fees may be adjusted periodically by the PASBO Board of Directors.

**Extensions** – Members may submit a request for an extension of time for renewal, not to exceed one year, to the Executive Director who will determine if the extenuating circumstances warrant an extension of time. However, granting an extension reduces the period of time for the next certification renewal by a corresponding amount of time. If an extension is denied, the applicant may appeal under the appeal process.

**Expiration** – An individual whose certification expires and has not been renewed shall comply with the initial requirements for certification. His/her record will show a break in certification.

**Other Requirements** – All other requirements listed for initial certification under each designation shall also be met for renewal, except educational requirements if the individual was grandfathered into the initial certification.

**Special Recognitions for Renewals** – The following special recognitions may be claimed by individuals wishing to renew their certification at the same or higher level.

- **School Business Experience as Alternative to Formal Education Requirement** – Years of school business official experience may substitute for the education requirement of an applicant in determining the level of designation for which an applicant qualifies. A full year (12 month period) of school business official experience is equivalent to 15 undergraduate credits. As an

example - 4 full years of school business official experience will be the equivalent of the Associate's Degree and 8 full years of school business official experience will be the equivalent of the Bachelor's Degree. Recognition of school business official experience as an alternative to formal education applies to registered members who desire to move to the next higher level of designation. (See Policy 716)

- **Certificates of Enhanced Qualifications (CEQs) as Alternative to Areas of Specialization Requirement** – Completion of CEQs may substitute as alternatives for the Areas of Specialization requirement of an applicant in determining the level of designation for which the applicant qualifies. Each CEQ successfully completed will count as one alternative for an Area of Specialization requirement and will be listed on the professional certification application. Recognition of CEQs as an alternate to Areas of Specialization applies to registered members who desire to move to a higher level of designation. (See Policy 717)
- **Secondary Areas of Responsibility as Alternative to Primary System-wide Responsibilities for Advancing from PCSBS to PCSBO** – Individuals wishing to advance from PCSBS to PCSBO may claim secondary areas of responsibility as an alternative to primary responsibilities as follows. Applicant may substitute one primary plus three secondary areas of responsibility in place of the three primary areas of responsibility. *A primary or system-wide area of responsibility must be a position that functions in such a way as to encompass all aspects of a task for the school entity. A secondary area of responsibility must be a position that functions in such a way as to encompass all aspects of a task for a specific department within the school entity.* Applicant must meet all other requirements for the higher level of designation in order to claim the secondary alternative. (See Policy 718)
- **Change of Position Resulting in Fewer Areas of Specialization** – If a registered member changes positions resulting in fewer Areas of Specialization, the individual can retain the higher designation and claim Areas of Specialization based upon experience in a previous position or school entity. Applicant must meet all other requirements to renew that level of certification. (See Policy 714)
- **Change of Position/Employment Resulting in a Different Membership Type** – If a registered member changes positions/employment resulting in ineligibility for Active membership, this individual shall be allowed to retain their designation provided they maintain appropriate type of membership for the new position and meet all other designation requirements in order to renew that particular level of certification. (See Policy 719)
- **Retirement** – Members holding a certified status at the time of retirement from school business administration may retain that designation without renewal so long as PASBO emeritus or life membership is retained. If PASBO emeritus or life membership is not retained, the certification will lapse and cannot be renewed unless active employment in school business administration and PASBO active or life membership is obtained.
- **Life Certification** – Upon certification for 24 years, members holding a certified status may retain that designation for “life” without renewal so long as PASBO membership is retained.

## SECTION II: CONTINUING EDUCATION UNIT (CEU) SYSTEM

A continuing education unit (CEU) system that is broad in scope has been established for initial and renewal certification. CEU categories have been classified into seven basic types for reporting purposes. No more than 75% of the total CEUs claimed may be reported as Type 1, Conferences and Group Programs.

In order to earn CEUs toward initial or renewal certification, they must relate to hours of effort on the part of the applicant. For example, two CEUs will be equal to one and a half to three hours of effort. Applicants are encouraged to participate annually in activities that would earn CEUs toward their certification.

Continuing education unit designations will be reviewed periodically by the Professional Certification Committee. PASBO members may request activities not listed to be reviewed for inclusion on the list by written request to the Executive Director for consideration by the Professional Certification Committee. In every case it is the responsibility of the applicant to maintain and track his/her CEUs. *Refer to Appendix B for the CEU Quick Reference Chart regarding qualifying activities and corresponding CEUs.*

### Activities that qualify for Continuing Education Units (CEUs)

A continuing education unit certification schedule is required to be submitted with the application. Each applicant will be required to maintain a CEU schedule file and supporting documentation for the initial and renewal certification periods for verification when requested. Each CEU category described below identifies the “type” of CEU for reporting on the CEU schedule that is part of the application package. See Appendix C.

- **Type 1: Conferences and Other Group Programs**

A “conference or other group program” is one in which multiple topics or issues are discussed, some of which may not relate to a specific area of system wide responsibility and at which a person’s attendance need not indicate specific participation in one or a series of educational programs. Examples would include PASBO regional chapter meetings and state and national association conferences. *A list of approved association conferences and group programs may be found in Appendix A.* No more than 75% of the CEUs reported shall qualify as Type 1, Conferences and Group Programs.

**Approved statewide professional conferences** – Four CEUs will be given for each two or more days attendance, verified by the sponsoring organization.

**Approved national professional conferences** – Four CEUs will be given for each two or more days of attendance, verified by the sponsoring organization.

**PASBO regional chapter meetings** – One CEU will be given for each regional chapter meeting attended, verified by a PASBO regional chapter officer.

- **Type 2: Professional Workshops**

**PASBO and other approved professional workshops and training seminars (report as Type 2 CEUs)** – Each segment of one and a half to three hours of instruction shall be equivalent to two CEUs. Three CEUs will be given for a half day program (more than three hours, but less than six hours) and a maximum of 4 CEUs will be given for a full day program (equal to or greater than six hours of instruction). Workshops must be directly related to the practice of school business and be offered by an approved organization. A list of such approved organizations is found in Appendix A. Consideration can be given to adding approved organizations to this list. Requests should be submitted to the Executive Director for consideration by the PASBO Board of Directors. Attendance shall be verified by the approved organization.

Alternative delivery methods of workshop programs such as on-line learning will also qualify as a Type 2 Professional Workshops and CEU credit will follow the same time guidelines as stated above or as specified by the issuing agency.

- **Type 3: College/University Credit and Correspondence Courses**

**College/university credit and correspondence courses (report as Type 3 CEUs)** – Four CEUs shall be granted for each credit earned in a graduate or undergraduate course directly related to school business administration. Non-credit courses shall be granted one CEU for each four hours of instruction for a maximum of three CEUs per course. Transcripts or evidence of course completion shall be provided. The PASBO Board of Directors shall adopt policies as necessary to determine whether courses are related to school business.

- **Type 4: Workshop Presenter/Speaker/Instructor**

**Workshop/conference presenter (report as Type 4 CEUs)** – A presenter at approved professional workshops and conferences shall receive the following CEUs: full day (4 CEUs), half day (3 CEUs) and less than half day (2 CEUs). Verification shall be obtained from the approved organization.

**Instructor of a College Course Related to School Business Administration (report as Type 4 CEUs)** – For each undergraduate or graduate credit hour of a course related to school business administration in which a member serves as the instructor, four CEUs shall be granted.

- **Type 5: Published Tips, Articles or Books**

**Published tips, articles, booklets and books (report as Type 5 CEUs)** – The author of a tip related to the improvement of school business management practices appearing in a professional publication shall earn one CEU. The author of an article related to the improvement of school business management practices appearing in a professional publication shall earn two CEUs. An author or co-author of a booklet on a professional subject related to school business administration shall receive three CEUs and a book shall receive six CEUs.

- **Type 6: Leadership Positions**

**PASBO and ASBO Officers/Directors and PASBO regional chapter office holders (report as Type 6 CEUs)** – Officers and members of the PASBO Board of Directors shall earn six CEUs for each year served. Officers and members of the ASBO Board of Directors shall earn six CEUs for each year served. The president, vice president, secretary and treasurer of PASBO regional chapters shall earn four CEUs for each year served.

**PASBO and ASBO committee assignments (report as Type 6 CEUs)** – Applicants shall receive three CEUs for each year served on a PASBO or ASBO committee. Committee chairs and vice chairs shall receive four CEUs for each year served. In order for an applicant to receive credit the committee assignment shall have required at least six hours of involvement by the applicant during the year.

**Leadership positions in other professional or educational organizations (report as Type 6 CEUs)** – Officers and directors of other professional or educational organizations related to school business management as described in Appendix A shall earn three CEUs for each year served. Committee members shall earn two CEUs.

**Service on Local, Regional, State or National Boards Related to School Business Administration or Education (report as Type 6 CEUs)** – For each year of service and for each qualified organization in which six or more hours of service is performed, two CEUs may be granted. A qualified organization may include local, regional, state or national boards or trusts related to cooperative business services, such as finance and insurance consortia or local school foundations.

- **Type 7: Other**

**ASBO or GFOA Certificate of Excellence in Financial Reporting or Meritorious Budget Awards and Award Reviewers (report as Type 7 CEUs)** – For the ASBO or GFOA Certificate of Excellence in Financial Reporting, 18 CEUs shall be earned upon notice of the first certificate being approved. The chief school business official may assign individual staff the CEUs earned in relation to the contribution. Each subsequent year in which the award is received shall result in four CEUs earned.

For the ASBO or GFOA Meritorious or Distinguished Budget Award, 18 CEUs shall be earned upon notice of the first award being approved. The chief school business official may assign individual staff the CEUs earned in relation to the contribution. Each subsequent year in which the award is received shall result in four CEUs earned.

PASBO members who are approved by ASBO or GFOA to review financial reports and budgets shall receive two CEUs for each financial report and/or budget reviewed for the award program.

**ASBO Certified Administrator of School Finance and Operations (SFO)** – PASBO members who obtain the SFO Certification shall earn three CEUs at the time of award. CEUs are earned for the initial certification only.

**PASBO Mentorship Program (report as Type 7 CEUs)** – PASBO members who serve as mentors or members who are being mentored shall earn CEUs for participation in the program. Mentors shall earn six CEUs for a year completed in the program and mentees (those being mentored)

shall earn six CEUs for a year completed. A maximum of six CEUs may be reported for initial or each renewal certification.

**Workshop Program Planner (report as Type 7 CEUs)** – PASBO members who serve as lead planner for PASBO workshops shall receive three CEUs for each workshop series planned.

**Consulting Review Team Member (report as Type 7 CEUs)** – PASBO members who serve on PASBO Consulting Review teams shall earn CEUs for participation as team members. Each review team member shall earn three CEUs for each full day at the review site and two CEUs for preparing the written report.

**Testimony at Hearings (as directed by the Executive Director) (report as Type 7 CEUs)** – From time to time, PASBO is requested to provide testimony at legislative or regulatory hearings. Members who are approved by the Executive Director to provide written and/or oral testimony at these hearings will receive four CEUs for issue development or written analysis and two CEUs for the oral presentation.

**PASBO and ASBO Award Programs (report as Type 7 CEUs)** – PASBO members who submit entries for PASBO and/or ASBO award programs and those who are selected as winners shall earn CEUs for participation in these programs, such as but not limited to PASBO Awards of Achievement, ASBO Eagle Service Awards or ASBO Pinnacle Awards. Members who submit qualifying entries shall earn two CEUs for each entry and award winners shall receive three CEUs.

**Benchmarking Submissions (report as Type 7 CEUs)** – PASBO members who submit entries into the PASBO benchmarking database will earn one CEU for each submission entered into the database.

**Pilot Programs and Special Projects (report as Type 7 CEUs)** – PASBO members who participate in designated pilot programs or special projects, such as those conducted by a state or federal government entity, shall receive two CEUs for each program or pilot.

## **SECTION III: AREAS OF SPECIALIZATION**

Candidates for registered status shall manage, supervise or perform three or more functions within the specific area of specialization in such a way as to encompass all aspects of the task for a school entity to assume credit for the specialization. Other areas of specialization may be considered by applying to the Executive Director for submission to the Professional Certification Committee to have them added to this list of approved specialties.

### **Auditing**

1. Pre-audit of internal procedures
2. Determines that prepared statements present fairly the financial position
3. Propriety, legality, and accuracy of financial transactions
4. Proper recording of all financial transactions
5. Post-audit procedures
6. External audits
7. Reconciliation of internal and external audits

### **Child Accounting**

1. Develops student register guidelines
2. Maintains student accounting records
3. Prepares and files - Annual Attendance Report and Summary Attendance Certificate
4. Prepares regular reports on attendance and enrollment
5. Assists staff in the proper procedures for student accounting
6. External audits
7. Reconciliation of internal and external audits

### **Cash Management & Investments**

1. Develops procedures and policy on cash management and investment
2. Develops cash projection report of revenues and expenditures of school entity funds
3. Selects the type and source of investments
4. Secures proper collateralization of investments
5. Maintains records and prepares monthly reports of cash and investments
6. Provides for full investment of funds

### **Debt Service & Capital Fund Management**

1. Long and short term financing
2. Maturities and debt payments
3. Long range capital improvement programs
4. Short term debt management
5. Debt service payment procedures and reports
6. Investment of surplus capital funds
7. Refunding of bond issues

### **Federal Grants**

1. Prepares annual Consolidated Application, Annual Comparability Reporting, quarterly/final expense reports
2. Oversees tracking of Title I, II, III expenditures



3. Maintains appropriate documentation of split funded staff/semiannual attestations, annual PDE 425 attestations for Highly Qualified Teachers, and biennial inventory of equipment purchased with federal funds
4. Oversees consultation with non-public institutions requiring Title I and ESL services as well as collaboration and fiscal monitoring of program with/for students living in home for neglected or delinquent youth
5. Prepares documentation for federal program monitoring
6. Ensures compliance with monitoring of annual parent notification and parent clinics
7. Determines annual Federal Programs budget in line with federal allocations
8. Reviews and responds to the annual independent single audit report as needed.
9. Recommends and enforces district-wide rules, policies, regulations and procedures for federal programs
10. Recruits, interviews, selects, trains, evaluates, and/or assigns employees of the federal programs office

#### **Financial Accounting**

1. Implements the school district's accounting system in accordance with "The Manual of Accounting and Related Financial Procedures of Pennsylvania School Districts"
2. Translates the school budget into a business office accounting system
3. Prepares the annual financial report of the General Fund for the state
4. Prepares monthly financial reports to the Board of Education
5. Reviews and responds to the annual independent audit report
6. Performs accounting procedures on payroll operation, trust and agency accounts, local, state, and federal taxes, retirement, social security, insurance programs, capital reserve funds, student activity fund and construction funds

#### **Financial Planning & Budgeting**

1. Budget compilation and preparation of the annual school budget
2. Long-term fiscal planning
3. Operating budget control
4. Expenditure and revenue estimates
5. Fiscal relationships with other governmental units
6. Prepares monthly financial reports to the board of education

#### **Food Service Management**

1. Preparation and serving of food to students and school employees
2. Recommends and enforces district-wide rules, policies, regulations and procedures for food service
3. Recruits, selects and supervises food service staff
4. Determines menus, prices and portion control
5. Responsible for food service accounting and reporting
6. Conducts in-service training for food service employees
7. Files state and federal claims for reimbursement, donated food, etc.

**Human Resources**

1. Recommends and enforces district-wide policies and procedures for personnel
2. Recruits, selects and assigns full-time, part-time and substitute employees
3. Maintains personnel records for each employee
4. Prepares personnel reports for the school district and the state
5. Interprets employee contract language on grievances
6. Provides employees with information on school district benefits
7. Manage employee performance
8. Determines the proper pay for employees and administer benefit plans
9. Directs in-service programs for employees
10. Act as the school entity Title IX or HIPAA privacy officer

**Information Technology Planning**

1. Recommends/maintains the technology plan
2. Recommends/prepares technology budget
3. Recommends technology purchases
4. Maintains hardware and software technology inventory

**Information Technology Resources Management**

1. Plans and directs the work of the technology staff
2. Determines the district technology staffing needs
3. Recommends and coordinates user training
4. Designs and maintains the flow of electronic communications
5. Manages electronic information systems

**Information Technology Infrastructure**

1. Supports programming analysis and design
2. Performs systems design and implementation
3. Maintains data integrity
4. Maintains security of information technology systems

**Insurance/Risk Management**

1. Review and selection of insurance programs
2. Determines level of coverage to be provided
3. Obtains insurable values on buildings and contents
4. Files insurance claims and reports
5. Directs insurance procurement procedures
6. Maintains insurance policies and claim records
7. Develops specifications and places insurance with companies, agents and brokers

**Maintenance of Facilities**

1. The repair of school buildings and equipment
2. The upkeep of grounds
3. Recommends and enforces maintenance policies, standards and frequency of maintenance
4. Schedules and allocates funds and manpower for the maintenance program
5. Selects, evaluates and assigns maintenance employees
6. Purchases and maintains inventory of maintenance supplies and equipment

**Negotiations (administrative, classified or certified employees)**

1. Determines negotiation procedures for the school district
2. Serves as chief negotiator or as a member of the management team
3. Prepares pertinent fiscal data for negotiations
4. Develops contract language and prepares employee contracts
5. Participates in employee grievances and arbitration
6. Implements the requirements of Act 195 and Act 88 for the school district
7. Serves as the district's expert on contract implementation and interpretation

**Office Management**

1. Determines the staffing needs of the school business offices
2. Establishes the functional requirements of each business office employee
3. Recruits, interviews, selects and assigns employees of the business office
4. Assigns duties and evaluates performance of business office employees
5. Coordinates the activities and functions of the business office
6. Instructs or trains business office employees on all required functions

**Operations of Facilities**

1. Responsible for custodial or engineering services for the school district
2. Determines standards and frequency of work
3. Allocates financial and human resources
4. Schedules assignments of the custodial staff
5. Inspects and evaluates the service
6. Coordinates the community use of school facilities
7. Provides the protection and security of facilities and property
8. Selects, directs and evaluates custodial employees

**Payroll Accounting**

1. Supervises school district's payroll operations
2. Responsible for establishing payroll policies and procedures
3. Maintains proper accounting of all payroll disbursements
4. Maintains and monitors all payroll records
5. Pays all employees in accordance with the negotiated contracts or board's approval
6. Prepares local, state and federal reports on payroll deductions

**Purchasing and Materials Management**

1. Designated purchasing agent for the school district
2. Processes purchase orders for the school district
3. Recommends and enforces purchasing policies, procedures and regulations
4. Prepares specifications and determines quality of equipment and supplies
5. Enforces School Code requirements for bidding and purchasing
6. Responsible for storage and delivery of supplies
7. Maintains inventory control
8. Serves as the school district's expert on the source and cost of supplies, equipment and services
9. Maintains records and catalogues on items to be purchased

**Real Estate and Capital Asset Management**

1. Handles administration requirements for the acquisition or sale of school sites
2. Negotiates rentals and leases of school sites
3. Recommends and enforces policies on after school use of building
4. Enforces compliance of the School Code and board of education policy on the sale and use of school facilities
5. Maintains inventory records and determines values of capital assets
6. Secures adequate insurance and provides for security of capital assets

**Safety & Security**

1. Responsible for the coordination of safety, security and crisis management plans
2. Develops accident and illness prevention and control programs
3. Coordinates safety activities, education and training throughout the school system
4. Maintains liaison with local law enforcement and emergency personnel
5. Prepares incident reports and tracks school violence reportable to PDE
6. Responsible for security and safety of school property and related equipment
7. Plans procedures for response to alarm and trouble signals
8. Recruits, recommends and supervises safety and security staff
9. Manages traffic and crowd control for events at the school facilities

**School Board Secretary**

1. Signs contracts, agreements, checks, correspondence, documents, minutes and reports.
2. Coordinate timelines, funds, deadlines, agendas, and meetings of the School Board
3. Collects information, opinions, ethics forms, surveys and funds for miscellaneous occasions.
4. Develops agendas, minutes, vacancy announcements, advertising and postings.
5. Prepares specifications, such as bids, financial reports for the board, agendas, different types of reports, facilities.
6. Coordinates agendas, travel, schedules, meetings and conferences.
7. Acts as liaison with administration, school board, parent groups, special-interest groups, support personnel and the media via public relations.
8. Advertises meetings, bids, sales, hearings, news releases, vacancy announcements and postings.
9. Acts as the school district's archivist.

**School and Community Relations**

1. Creates and produces community newsletters
2. Creates and produces internal newsletters
3. Creates and produces news releases
4. Keeps the public and staff informed about school activities
5. Promotes public involvement in the schools
6. Provides district-wide in-service programs on improved public relations
7. Serves as school district's liaison for radio, television and newspaper reporters

**School Facility Planning and Construction Supervision**

1. Assists in the establishment of educational standards for sites, buildings and equipment
2. Conducts facility utilization studies
3. Prepares projection of facility needs
4. Assists in the design, construction and selection of equipment for the facility
5. Enforces safety standards on construction sites
6. Develops procedures for the selection of an architect
7. Reviews, approves and enforces compliance of construction and maintenance contracts
8. Provides on-site supervision of renovation and/or construction projects

**Tax Administration**

1. Establishes district policy and procedures on the collection of school taxes
2. Receives, deposits and records the collection of school taxes
3. Responsible for school assessment, levy and tax collection procedures as required by law
4. Prepares monthly reports on the receipt, deposit and collection of taxes
5. Designs and distributes forms for the collection of taxes
6. Coordinates and audits the reports of selected tax officials
7. Maintains the district census record

**Transportation Management**

1. Supervises the system of transportation of students to and from school
2. Recommends and enforces transportation policies, rules, regulations and procedures
3. Determines bus routing and scheduling
4. Oversees bus inspection and maintenance
5. Recruits, selects, assigns and evaluates bus drivers
6. Provides for training of bus drivers
7. Evaluates transportation services and efficiency of operations
8. Purchases buses or selects bus contractors
9. Prepares local and state reports on transportation services

## **APPENDIX A – APPROVED ORGANIZATIONS FOR CONFERENCES, GROUP PROGRAMS AND WORKSHOP CEUs**

Pennsylvania Association of School Business Officials  
Association of School Business Officials International  
Pennsylvania School Boards Association  
Pennsylvania Association of School Administrators  
Pennsylvania Association of Elementary/Secondary School Principals  
Pennsylvania Association of Intermediate Units  
Pennsylvania Department of Education  
Pennsylvania Pupil Transportation Association  
Attendance/Child Accounting Professional Association  
Pennsylvania Institute of Certified Public Accountants  
American Institute of Certified Public Accountants  
National School Boards Association  
American Association of School Administrators  
American Management Association  
Pennsylvania School Food Service Association  
American School Food Service Association  
Pennsylvania Association of Federal Program Coordinators  
Pennsylvania School Public Relations Association  
Pennsylvania Association of School Personnel Administrators  
Pennsylvania Association of Vocational Administrators  
Pennsylvania Government Finance Officers Association  
American Government Finance Officers Association  
American Association of Educational Service Agencies  
National Association of Accountants  
Pennsylvania Economy League  
League of Women Voters  
Other Professional Education Associations approved by the PASBO Board  
Other Business Associate or Commercial Groups approved by the PASBO Board  
Providers approved by other state/federal agencies providing certification credit required for asbestos, pesticide, water/wastewater or other certifications

*NOTE: Questions about any training program qualifying for CEUs should be directed to the PASBO office in advance of the program to determine eligibility. For all programs qualifying for CEUs, participants should keep on file evidence of certification and the program content, such as the agenda or completion certificate.*

## APPENDIX B – CEU QUICK REFERENCE CHART

<b>POLICY #</b>	<b>CEU CATEGORY OR ACTIVITY</b>	<b>TYPE</b>	<b>CEUs</b>
745	Graduate or Undergraduate Course	3	4/cred.hr.
765	Conference/Group Programs	1	4 max.
765	Regional chapter meetings	1	1/mtg.
765	State or National Leadership Conference	1	4 max.
767	ASBO CAFR/Cert. Of Excellence Reviewer	7	2/report
767	ASBO Meritorious Budget Award Reviewer	7	2/report
767	ASBO or GFOA Certificate of Excellence – initial	7	18-initial
767	ASBO or GFOA Certificate of Excellence – renewal	7	4-renewal
767	ASBO Meritorious Budget Award – Initial	7	18-initial
767	ASBO Meritorious Budget Award – Renewal	7	4-renewal
767	GFOA Distinguished Budget Award – Initial	7	18-initial
767	GFOA Distinguished Budget Award – Renewal	7	4-renewal
767	ASBO SFO Certification	7	3-initial
768	Service on national/state/regional/local school business management board/foundation	6	2/year
770	Workshop attendance – full day	2	4
770	Workshop attendance – half day	2	3
770	Workshop attendance (webcast) – 2 hours or less	2	2
774	Publications – book	5	6
774	Publications – booklet	5	3
774	Publications – article	5	2
774	Publications – tip	5	1
775	College instructor – graduate/undergraduate	4	4/credit hour
775	Workshop and conference presenter – full day	4	4
775	Workshop and conference presenter – half day	4	3
775	Workshop and conference presenter – less than half day	4	2
776	PASBO workshop program lead planner	7	3/program
777	PASBO Consulting Review Team Member – on-site	7	3/day
777	PASBO Consulting Review Team Member – report	7	2

<b>POLICY #</b>	<b>CEU CATEGORY OR ACTIVITY</b>	<b>TYPE</b>	<b>CEUs</b>
778	Development of Testimony at hearings/Ex. Dir. Assigned	7	4
778	Presentation of Testimony at hearings/Ex. Dir. Assigned	7	2
779	PASBO benchmarking submission	7	1
780	PASBO regional chapter officer	6	4/year
780	PASBO/ASBO committee chair/vice chair	6	4/year
780	PASBO/ASBO committee member	6	3/year
780	ASBO officer or director	6	6/year
780	PASBO officer or director	6	6/year
781	Officer/director – other approved organization	6	3/year
781	Committee/other approved organization	6	2/year
784	PASBO Awards of Achievement - submission	7	2
784	PASBO Awards of Achievement - winner	7	3
784	ASBO Pinnacle Award – submission	7	2
784	ASBO Pinnacle Award – winner	7	3
784	ASBO Eagle Service Award - submission	7	2
784	ASBO Eagle Service Award - winner	7	3
785	Mentorship Program – mentor (one year)	7	6
785	Mentorship Program – mentee (one year)	7	6
786	Approved pilot program or special project	7	2

***No more than 75% of total CEUs reported shall qualify as Type I, Conference and Group Programs***





## PASBO PROFESSIONAL CERTIFICATION APPLICATION

**Submit to:** Stephanie Stehman  
Membership & Professional Certification Manager  
PASBO, 2608 Market Place, Harrisburg, PA 17110  
[sstehman@pasbo.org](mailto:sstehman@pasbo.org)

Date \_\_\_\_\_

### Applicant Information:

Name \_\_\_\_\_ Title \_\_\_\_\_

School Entity \_\_\_\_\_

School Mailing Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### Check one:

- ☐ Initial Application
- ☐ Renewal Application

### Designation you are applying for:

- ☐ PCSBA – Pennsylvania Certified School Business Administrator
- ☐ PCSBO – Pennsylvania Certified School Business Official
- ☐ PCSBS – Pennsylvania Certified School Business Specialist

### I have enclosed the following required items:

- ☐ Completed application
- ☐ Schedule for Reporting CEUs  
\*Supporting documentation for PASBO events and workshops is **not** needed. PASBO will verify with our records.
- ☐ Copy of transcript(s) for any new college/univ. courses that are being claimed for CEU credit
- ☐ Payment fee (**see below**)

### The following are also required for initial applications and those upgrading to a higher designation:

- ☐ Current job description
- ☐ Current school entity organizational chart
- ☐ Photocopy of college/university diploma(s)
- ☐ Copy of all college/university transcript(s)

### Payment Fee of \$50.00:

- ☐ Check – enclosed (Payable to PASBO)
- ☐ Credit Card – Cardholder Name: \_\_\_\_\_ Authorized \$ \_\_\_\_\_

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Signature \_\_\_\_\_

## FOR THE STATUS OF PENNSYLVANIA CERTIFIED SCHOOL BUSINESS ADMINISTRATOR, OFFICIAL, OR SPECIALIST

This is to certify that I, the undersigned, have complied with all the requirements for the status of a Pennsylvania Certified School Business Administrator, Official, or Specialist. In addition to proper documentation provided here, I attest that I have demonstrated high standards of ethics, a commitment to my professional responsibilities in school business management, and I have made and will continue to make contributions to this profession and to the Pennsylvania Association of School Business Officials

### 1) Membership

I am and have been a participating member of the Pennsylvania Association of School Business Officials for at least the immediate three years prior to this application. I held PASBO "active" or "life" membership for the school years \_\_\_\_\_ through \_\_\_\_\_.

### 2) Areas of Specialization

The specific areas for which I have system wide administrative and/or supervisory responsibilities in accordance with Section III are:

(If claiming the Alternative Secondary Areas option to go from PCSBS to PCSBO, identify 1 Primary (P) and 3 Secondary (S) areas)

- |   |  |
|---|--|
| <input type="checkbox"/> Auditing                                   | <input type="checkbox"/> Maintenance of Facilities                           |
| <input type="checkbox"/> Child Accounting                           | <input type="checkbox"/> Negotiations  |
| <input type="checkbox"/> Cash Management & Investments              | <input type="checkbox"/> Office Management                                   |
| <input type="checkbox"/> Debt Service & Capital Fund Managements    | <input type="checkbox"/> Operations of Facilities                            |
| <input type="checkbox"/> Federal Grants                             | <input type="checkbox"/> Payroll Accounting                                  |
| <input type="checkbox"/> Financial Accounting                       | <input type="checkbox"/> Purchasing/Materials Management                     |
| <input type="checkbox"/> Financial Planning & Budgeting             | <input type="checkbox"/> Real Estate/Capital Asset Management                |
| <input type="checkbox"/> Food Service Management                    | <input type="checkbox"/> Safety & Security                                   |
| <input type="checkbox"/> Human Resources                            | <input type="checkbox"/> School Board Secretary                              |
| <input type="checkbox"/> Information Technology Planning            | <input type="checkbox"/> School & Community Relations                        |
| <input type="checkbox"/> Information Technology Resource Management | <input type="checkbox"/> School Facility Planning & Construction Supervision |
| <input type="checkbox"/> Information Technology Infrastructure      | <input type="checkbox"/> Tax Administration                                  |
| <input type="checkbox"/> Insurance & Risk Management                | <input type="checkbox"/> Transportation Management                           |

I ☐ AM ☐ AM NOT claiming a combination of Areas of Specialization and Certificates of Enhanced Qualifications (CEQs) to meet the requirement.

### 3) Certificates of Enhanced Qualifications (CEQs)

Summarized below are CEQs I have accumulated to satisfy the Areas of Specialization requirement. I understand each CEQ granted may be used to satisfy one Area of Specialization requirement. (*Attach a photocopy of your CEQ plaque*)

CEQ Awarded _____	Date Completed _____
CEQ Awarded _____	Date Completed _____
CEQ Awarded _____	Date Completed _____
CEQ Awarded _____	Date Completed _____

#### 4) Educational Background

Institution	Dates Attended	Degree/Certificate Received
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

I ☐ AM ☐ AM NOT claiming a combination of Areas of Specialization and Certificates of Enhanced Qualifications (CEQs) to meet the requirement.

#### 5) Employment History

Employer	City/State	Employed		Position
		From	To	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

#### 6) Summary of Continuing Education Units (CEUs)

Summarized below are the CEUs I have accumulated to satisfy registration requirements. The **Schedule for Reporting Continuing Education Units (CEUs)** is included on the last page of this application for verification. Other supporting documentation is in my possession and is available upon request.

	# of CEUs Claimed
Type 1 – Conferences and other group programs	_____
Type 2 – Professional workshops	_____
Type 3 – College/university credits and correspondence courses	_____
Type 4 – Workshop presenter/speaker/instructor	_____
Type 5 – Published tips/articles/books	_____
Type 6 – Leadership positions	_____
Type 7 – Other	_____
<b>Total CEUs =</b>	_____

	PCSBA	PCSBO	PCSBS
Minimum CEUs required for <u>initial</u> certification	48	24	12
Minimum CEUs required for <u>renewal</u> certification	64	32	16

## 7) Applicant Affidavit

I certify to the truth and accuracy of all the statements and representations made in this application. I understand that certification under this application will be conducted using the criteria and procedures stated in the publication entitled "PASBO Professional Certification Program Guide" (most current edition) and related policies adopted by the PASBO Board of Directors.

I hereby grant the Pennsylvania Association of School Business Officials, its staff and its officials permission to review and verify any information submitted as part of this application or any subsequent renewal.

Print Name \_\_\_\_\_  
Signature \_\_\_\_\_  
Title \_\_\_\_\_  
School Entity \_\_\_\_\_  
Date \_\_\_\_\_

## 8) Verification by the Chief School Administrator

This is to certify that I, the undersigned, have carefully inspected the information contained in this completed application; that said applicant has correctly and accurately checked the areas of responsibility indicated under section 2 and that all other information supplied is to the best of my knowledge a true and accurate statement; further, I certify that said applicant is known by me to possess a high degree of character and integrity and has demonstrated competence and proficiency in his/her school business assignments and responsibilities.

☐ Dr.      ☐ Mr.      ☐ Mrs.      ☐ Ms.

Print Name \_\_\_\_\_  
Signature \_\_\_\_\_  
Title \_\_\_\_\_  
School Entity \_\_\_\_\_  
Telephone \_\_\_\_\_  
Date \_\_\_\_\_

## 9) Schedule for Reporting Continuing Education Units (CEUs)

Report CEUs consecutively by type and in chronological order. Supporting documentation is **not** needed for PASBO events or workshops. For non-PASBO activities, please provide a copy of supporting evidence if available or applicable. This form may be reproduced as needed.

[illegible]