

Chief School Business Official

[29.110]

STANDARD 1 – Educational Foundations of Schools

The competent chief school business official is knowledgeable about the educational foundations of schools.

Knowledge Indicators - *The competent chief school business official:*

- 1A. is knowledgeable about the historic foundations of education as they relate to the development of public, tax-supported schools.
- 1B. understands the development and funding of private schools.
- 1C. comprehends legislative acts guaranteeing the right of an education to all people.
- 1D. **Performance Indicator** - The competent chief school business official analyzes and supports the school's responsibility for the academic, cultural, physical, emotional, and social development of the student.

STANDARD 2 – Organization and Administration

The competent chief school business official understands and demonstrates various organizational leadership models.

- 2A. **Knowledge Indicator** - The competent chief school business official understands various organizational leadership models.

Performance Indicators - *The competent chief school business official:*

- 2B. utilizes methods of assigning personnel and resources to accomplish specific goals and objectives.
- 2C. uses scheduling techniques to coordinate tasks to maximize personnel and resource use.
- 2D. exhibits skills in identifying problems, securing relevant information, and recognizing possible causes of conflict.
- 2E. exhibits skills in questioning techniques, fact finding, categorizing information, and retention of relevant data.
- 2F. collects, analyzes, and evaluates various types of information to generate alternate solutions, proper decisions, possible consequences, and contingency plans.

STANDARD 3 – Public Policy and Intergovernmental Relations

The competent chief school business official understands and applies theories of public policy and intergovernmental relations.

Knowledge Indicators - *The competent chief school business official:*

- 3A. understands how to interpret and apply the policies and roles of local boards of education, state boards of education, state legislatures, and the federal government.

- 3B. comprehends the role of special interest groups (within a school district) and their ability to influence those who approve district policy.
- 3C. **Performance Indicator** - The competent chief school business official analyzes and synthesizes the political and legislative processes of the following entities: local school boards, municipal governments, state legislatures, and other governmental jurisdictions.

STANDARD 4 – Legal Aspects

The competent chief school business official understands and applies the legal aspects of educational leadership.

Knowledge Indicators - *The competent chief school business official:*

- 4A. understands the State and federal constitutional rights that apply to individuals within the public education system.
- 4B. understands appropriate statutory and constitutional authority regarding the general administration of public schools.
- 4C. **Performance Indicator** - The competent chief school business official analyzes and implements significant statutory and case law relative to a number of management fields, including financial resource, human resource, facility and property, information, and ancillary services (including subcontracting).

STANDARD 5 – Principles of School Finance

The competent chief school business official understands and demonstrates the principles of school finance.

- 5A. **Knowledge Indicator** - The competent chief school business official comprehends the principles of school finance.

Performance Indicators - *The competent chief school business official:*

- 5B. identifies and analyzes the major sources of revenue for public schools at the local, State, and federal levels.
- 5C. applies various techniques for estimating and identifying the expenditures for a public school district in terms of cost centers and programs within each district.
- 5D. identifies and examines the significant sources of State and local revenue and projects the impact on the school district of increases or decreases of these sources.
- 5E. recognizes significant social, demographic and economic changes.

STANDARD 6 – Budgeting and Financial Planning

The competent chief school business official understands and applies the various approaches to public school budgeting.

- 6A. **Knowledge Indicator** - The competent chief school business official understands the principles of public school budgeting.

Performance Indicators - *The competent chief school business official:*

- 6B. prepares a budget calendar to meet the time constraints of budget preparation.
- 6C. analyzes the various approaches to enrollment and personnel projections.
- 6D. forecasts anticipated revenue by source.
- 6E. forecasts anticipated expenditures by program.
- 6F. identifies various methods for budget analysis and management.
- 6G. applies statistical process control techniques for budgetary analysis.
- 6H. applies the legal requirements for budget adoption.
- 6I. prepares a school institution budget based on hypothetical data.
- 6J. prepares revenue projections and estimates of expenditures using appropriate and varied techniques.
- 6K. identifies and interprets internal and external influences on the budget.

STANDARD 7 – Accounting, Auditing, and Financial Reporting

The competent chief school business official understands and demonstrates the principles of accounting, auditing, and financial reporting.

Knowledge Indicators - *The competent chief school business official:*

- 7A. understands how to present fairly and with full disclosure the financial position and results of financial operations of the funds and account groups of the school district in compliance with generally accepted accounting principles.
- 7B. understands the use and role of an internal auditor.

Performance Indicators - *The competent chief school business official:*

- 7E. prepares appropriate interim and annual financial statements and reports of financial position and operating results.
- 7F. prepares revenues and expenditures by fund (using the appropriate State chart of accounts, electronic data processing, etc.).
- 7G. facilitates management's control of all financial operations and funds using appropriate technology.
- 7H. establishes and verifies compliance with finance-related legal and contractual provisions.
- 7I. develops and maintains all fixed assets in a General Fixed Asset Account Group.
- 7H. communicates how the budget and available resources of the school district support the institution's program.
- 7J. analyzes both monthly and annual financial statements and reports.
- 7K. develops specifications for the employment of an independent auditor.
- 7L. applies the appropriate bases of accounting (modified accrual basis of accounting, accrual basis of accounting, or cash basis of accounting) in measuring financial position and operating results.

STANDARD 8 – Cash Management, Investments, and Debt Management

The competent chief school business official understands and implements cash management, investment, and debt management procedures.

Knowledge Indicators - *The competent chief school business official:*

- 8A. understands how to develop specifications for the selection of banking services and the concept of compensating balances.

- 8B. comprehends procedures and legal constraints for cash collection and disbursements.
- 8C. understands the risks and calculates the yields on various investment options available to a school district.

Performance Indicators - *The competent chief school business official:*

- 8D. applies various methods of cash forecasting.
- 8E. uses the appropriate types of short-term financing instruments available to school districts.
- 8F. analyzes the legal constraints and methods of issuing long-term general obligation bonds, including the bond rating process and the role of rating services.
- 8G. prepares a cash flow analysis for a hypothetical school district.
- 8H. implements the concept of appropriate fund balance management.

STANDARD 9 – Personnel and Benefits Administration

The competent chief school business official understands and implements human resource management procedures for non-instructional personnel.

- 9A. **Knowledge Indicator** - The competent chief school business official understands factors involved in formulating policies and procedures related to the management of non-instructional personnel.

Performance Indicators - *The competent chief school business official:*

- 9B. demonstrates appropriate skills related to the recruitment, selection, orientation, evaluation, and assignment of non-instructional personnel, including the creation of job descriptions.
- 9C. analyzes and demonstrates procedures for bidding, selecting, evaluating, and managing fringe benefit programs.
- 9D. applies the legal procedures for the recruitment, selection, orientation, assignment, and termination of non-instructional personnel.
- 9E. leads subordinates in understanding the expectations for the implementation of all board policies, as well as State and federal laws related to personnel.
- 9F. analyzes the legal requirements and tax consequences of fringe benefit programs, using federal and State codes.

STANDARD 10 – Staff Development

The competent chief school business official understands and implements staff development procedures for non-instructional personnel.

Knowledge Indicators - *The competent chief school business official:*

- 10A. identifies staff development priorities.
- 10B. identifies models for the program and completes cost analysis of staff development programs.
- 10C. identifies appropriate procedures for the management of staff development programs.

Performance Indicators - *The competent chief school business official:*

- 10D. incorporates the major components of adult learning into the creation of an effective, sequential process for staff development.
- 10E. applies the appropriate skills for the administration of a comprehensive staff development program for non-instructional staff.

STANDARD 11 – Labor Relations/Collective Bargaining

The competent chief school business official understands and addresses labor relations/collective bargaining issues.

11A. **Knowledge Indicator** - The competent chief school business official comprehends labor relations/collective bargaining issues.

Performance Indicators - *The competent chief school business official:*

- 11B. analyzes board of education policies and State statutes regarding collective negotiations.
- 11C. applies appropriate procedures for the development of the board of education's negotiation team and strategies for conducting negotiation sessions.
- 11D. applies appropriate procedures for improving the relationships between management and district employees.
- 11E. develops salary schedules and fringe benefit packages.
- 11F. analyzes models for assessing the costs of salary and fringe benefit proposals.

STANDARD 12 – Planning and Construction

The competent chief school business official understands and implements appropriate facility planning and construction procedures.

Knowledge Indicators - *The competent chief school business official:*

- 12A. identifies the steps and procedures necessary to develop a strategic plan for facilities.
- 12B. understands funding sources and issues related to school construction, including bond ratings, rating process, and bond election processes.

Performance Indicators - *The competent chief school business official:*

- 12C. develops appropriate procedures for selecting and using the professional services of architects, engineers, risk managers, construction managers, general contractors and other professionals and understands their roles and responsibilities.
- 12D. applies protocols and procedures involved in developing and using educational specifications.
- 12E. applies protocols and procedures for selecting school sites.
- 12F. analyzes the legal and administrative responsibilities of advertising, awarding, and managing construction contracts and knows how to respond to contractor bankruptcy, product failure, and poor workmanship.
- 12G. evaluates the research, current practices, and issues regarding the impact of energy, safety, and environmental factors.
- 12H. analyzes the legal context within which school facilities are planned, constructed, and operated and the various federal and State agencies and their roles in the process.
- 12I. plans for facilities-related needs: prepares population projections; develops educational specifications; analyzes amortization of bond issues; evaluates buildings; etc.

STANDARD 13 – Maintenance and Operations

The competent chief school business official understands and implements appropriate maintenance and operations procedures.

Knowledge Indicators - *The competent chief school business official:*

- 13A. understands protocol and procedures required to keep schools clean and safe through routine custodial services and preventive and remedial maintenance.
- 13B. understands protocol and procedures required to manage energy consumption efficiently and effectively and secure energy grants.

Performance Indicators - *The competent chief school business official:*

- 13C. computes custodial allocations, determines energy budgets for school centers, and develops manpower plans for maintenance divisions of simulated or actual school districts.
- 13D. creates and uses simulations of maintenance and operation functions that enable decisions related to resource allocation.

STANDARD 14 – Purchasing

The competent chief school business official understands and implements appropriate purchasing procedures.

- 14A. **Knowledge Indicator** - The competent chief school business official understands appropriate purchasing procedures.

Performance Indicators - *The competent chief school business official:*

- 14B. applies generally accepted accounting principles and procedures in the bidding and purchasing processes.
- 14C. incorporates legal and ethical considerations in the bidding and purchasing processes.
- 14D. utilizes computerized management systems for tracking requisitions, purchase orders, deliveries, invoices, payments, and the status of the budget.

STANDARD 15 – Supply and Fixed Asset Management

The competent chief school business official understands and implements appropriate supply and fixed asset management procedures.

- 15A. **Knowledge Indicator** - The competent chief school business official comprehends appropriate supply and fixed asset management procedures.

Performance Indicators - *The competent chief school business official:*

- 15B. manages and controls inventories.
- 15C. plans and implements a program for the maintenance and repair of equipment.
- 15D. provides, produces, and uses the financial analysis of life cycle costs and quality control methods.
- 15E. applies the proper procedures relating to the legal evaluation and disposal of surplus property.
- 15F. utilizes amortization techniques pertaining to the purchase of new and/or replacement capital equipment.

STANDARD 16 - Real Estate Management

The competent chief school business official understands and implements appropriate real estate management procedures.

- 16A. **Knowledge Indicator** - The competent chief school business official understands appropriate real estate management procedures.

Performance Indicators - *The competent chief school business official:*

- 16B. applies legal procedures in acquiring and disposing of land, buildings, and equipment.
- 16C. collaborates with other governmental agencies regarding zoning issues, long-range land use planning, and the impact of commercial and residential development on schools.
- 16D. applies proper real estate management policies, procedures, and practices.
- 16E. utilizes a computer program or service to manage the fixed assets of a simulated or actual educational institution.

STANDARD 17 - Strategic Planning

The competent chief school business official understands and implements strategic planning procedures.

- 17A. **Knowledge Indicator** - The competent chief school business official understands strategic planning procedures.

Performance Indicators - *The competent chief school business official:*

- 17B. facilitates administrative and employee teams in the identification of short- and long-term goals in all aspects of school district activities.
- 17C. develops a strategic plan that will move the district toward achievement of its mission and goals.

STANDARD 18 - Program Evaluation

The competent chief school business official understands and implements appropriate program evaluation procedures for non-instructional programs.

Knowledge Indicators - *The competent chief school business official:*

- 18A. understands the components and skills needed to evaluate programs and business services.
- 18B. identifies various economic and cost factors inherent in program evaluation.

Performance Indicators - *The competent chief school business official:*

- 18C. develops a procedure for the systematic evaluation of non-instructional programs.
- 18D. analyzes and develops alternative methods of measuring program outcomes.

STANDARD 19 – Communications

The competent chief school business official understands and demonstrates communications procedures.

- 19A. **Knowledge Indicator** - The competent chief school business official comprehends effective communication strategies and techniques related to mass and interactive communications (oral, aural, written, and nonverbal).

Performance Indicators - *The competent chief school business official:*

- 19B. articulates ideas clearly, concisely, and effectively.
- 19C. develops a plan for a positive school-community relations program for the business office.
- 19D. develops procedures for the management of public information programs and departments that relate to business services.

STANDARD 20 – Management Information Systems

The competent chief school business official understands and utilizes management information systems.

- 20A. **Knowledge Indicator** - The competent chief school business official understands the functions of management information systems.

Performance Indicators - *The competent chief school business official:*

- 20B. applies current technology in regard to the storage, analysis and communication of data.
- 20C. evaluates the benefits of producing information in relation to costs.
- 20D. develops a records management system, using appropriate technology, that complies with all legal requirements.
- 20E. develops a long-range technology plan for a school district.
- 20F. evaluates computer hardware and software for use in the school business office.

STANDARD 21 – Risk Management

The competent chief school business official understands and implements risk management procedures.

Knowledge Indicators - *The competent chief school business official:*

- 21A. comprehends the common types of insurance protection needed.
- 21B. understands federal and state statutes regarding liability limits and bond requirements.

Performance Indicators - *The competent chief school business official:*

- 21C. develops policies and procedures regarding safety programs for both students and employees.
- 21D. identifies models to evaluate the risk management program of a school district.
- 21E. provides education on risk management issues to school district personnel.

STANDARD 22 - Transportation

The competent chief school business official understands and implements transportation procedures.

- 22A. **Knowledge Indicator** - The competent chief school business official understands the appropriate transportation procedures needed to ensure the safe transport of children.

Performance Indicators - *The competent chief school business official:*

- 22B. analyzes the various methods of providing transportation for students and identifies the most efficient method for a given district.
- 22C. develops transportation routes and schedules, and programs for the selection and training of staff.
- 22D. applies appropriate management principles in the maintenance and operation of a district's transportation program to ensure the safe transportation of students.

STANDARD 23 - Food Service

The competent chief school business official understands and implements food service procedures.

Knowledge Indicators - *The competent chief school business official:*

- 23A. understands a system for high-quality food production, operation, and service.
- 23B. comprehends the financial aspects of school food service (federal, State, and local).

Performance Indicators - *The competent chief school business official:*

- 23C. applies State and federal guidelines regarding free and/or reduced-price meal subsidies and qualifications for participation.
- 23D. interacts with representatives of nutritional and regulatory agencies in planning, conducting, and reporting on food service programs.

STANDARD 24 – Health and Safety

The competent chief school business official understands and implements health and safety procedures.

Knowledge Indicators - *The competent chief school business official:*

- 24A. comprehends the components of a health and safety program and establishes policies and administrative procedures for students, employees, and the community that comply with federal and State regulations.
- 24B. understands State and federal laws regarding asbestos abatement, radon gas, lead contaminants, and other potentially hazardous substances.

Performance Indicators - *The competent chief school business official:*

- 24C. facilitates training for employees that will enable them to be more cognizant of dangerous environmental factors.
- 24D. develops and implements a process for assessing potential safety hazards in school buildings and on school grounds.
- 24E. prepares a school district disaster preparedness and recovery plan.
- 24F. develops and implements district policies regarding students and staff infected with contagious diseases.