
ILLINOIS CERTIFICATION TESTING SYSTEM

FIELD 185: CHIEF SCHOOL BUSINESS OFFICIAL TEST FRAMEWORK

November 2003

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School Business Management
School Finance
School Organization, Services, Operations, and Safety

SUBAREA I—SCHOOL BUSINESS MANAGEMENT

0001 Understand the educational foundations of schools.

For example:

- Demonstrate knowledge of the historical, social, and philosophical foundations of the U.S. public school system.
- Demonstrate understanding of the development and funding of public schools.
- Describe major legislative acts guaranteeing the right of an education to all people.
- Demonstrate understanding of the school's responsibility for supporting the cognitive, physical, emotional, and social development of students.

0002 Understand organizational leadership models and skills.

For example:

- Demonstrate understanding of major organization, management, and administrative theories.
- Describe strategies and procedures, including scheduling techniques, for effectively using personnel and resources to accomplish goals and coordinate tasks.
- Demonstrate knowledge of principles and procedures for identifying problems, recognizing possible causes of conflict, and evaluating possible consequences of actions.
- Demonstrate knowledge of procedures for collecting, analyzing, and evaluating various types of information to generate alternate solutions, make decisions, and formulate contingency plans.
- Demonstrate knowledge of skills and techniques for questioning, fact finding, categorizing information, and retaining relevant data.

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0003 Understand legal aspects of educational administration and leadership.

For example:

- Recognize state and federal constitutional rights that apply to individuals within the public education system.
- Demonstrate understanding of statutory and constitutional authority governing the general administration of public schools.
- Demonstrate understanding of significant statutory and case law related to the management of a school's financial resources, human resources, facility and property, information, and ancillary and support services.

0004 Understand strategic planning procedures.

For example:

- Demonstrate knowledge of strategies and techniques for supporting administrative and employee teams in the identification of short- and long-term goals in all aspects of school district activities.
- Demonstrate knowledge of principles and procedures for developing strategic plans that will move the district toward achievement of its educational mission and goals.

0005 Understand evaluation procedures for noninstructional programs and services.

For example:

- Demonstrate understanding of principles, skills, and processes for evaluating noninstructional school programs and business services.
- Demonstrate knowledge of how to develop and implement procedures for the systematic evaluation of noninstructional programs.
- Describe economic and cost factors inherent in program evaluation.
- Demonstrate understanding of alternative methods of measuring program outcomes.

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0006 Understand communications procedures.

For example:

- Demonstrate knowledge of the components of clear, concise, and effective communication.
- Demonstrate knowledge of effective communication strategies and techniques used in public or mass communications (e.g., districtwide communication).
- Demonstrate knowledge of effective oral, listening, written, and nonverbal communication strategies and techniques used in interpersonal communication.
- Describe strategies and techniques for establishing and maintaining a positive school-community relations program for the business office.

0007 Understand the management of information systems.

For example:

- Demonstrate understanding of current technologies related to the storage, analysis, and communication of data and information.
- Evaluate the benefits of producing information in relation to the costs of producing information.
- Recognize purposes and procedures for developing a records management system that complies with all legal requirements (e.g., maintaining an accurate database to facilitate management decisions).
- Identify principles, techniques, and criteria for evaluating computer hardware and software for use in all aspects of the school system, including the school business office.

SUBAREA II—SCHOOL FINANCE

0008 Understand the principles of school finance.

For example:

- Demonstrate knowledge of major sources of revenue for public schools at the local, state, and federal levels.
- Demonstrate understanding of the effect on a school district of significant increases or decreases in funding from state and local sources of revenue.
- Recognize the implications for school finances of social, demographic, and economic changes.

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0009 Understand approaches to public school budgeting.

For example:

- Demonstrate knowledge of principles, steps, and procedures used in preparing a school district budget, including the preparation of a budget calendar.
- Demonstrate understanding of various approaches for projecting student enrollment, changes in enrollment, and personnel needs.
- Describe strategies and procedures for forecasting anticipated revenues and expenditures and preparing revenue projections and estimates of expenditures.
- Recognize the legal requirements for budget adoption.
- Demonstrate understanding of budget analysis and management procedures, including statistical process control techniques used for budgetary analysis.
- Evaluate internal and external influences on the school budget.

0010 Understand accounting, auditing, and financial reporting principles.

For example:

- Demonstrate understanding of business accounting principles and procedures (e.g., preparing revenues and expenditures by fund using the appropriate state chart of accounts).
- Demonstrate knowledge of how to present fairly and with full disclosure the financial position and results of financial operations of funds and account groups of the school district.
- Demonstrate knowledge of the appropriate uses of bases of accounting (i.e., modified accrual basis, accrual basis, or cash basis) in measuring financial position and operating results.
- Recognize principles and techniques for preparing interim, monthly, and annual statements of financial position and operating results, for analyzing monthly and annual financial statements, and for communicating how the budget and available resources support school or district programs.
- Demonstrate knowledge of procedures for establishing and verifying compliance with finance-related legal and contractual provisions.
- Recognize the duties, roles, and qualifications of internal auditors and independent auditors.

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0011 Understand cash management, investment, and debt management procedures.

For example:

- Demonstrate understanding of the concept of compensating balances and how to develop specifications for the selection of banking services.
- Demonstrate the ability to evaluate the risks and to calculate the yields on various investment options available to a school district.
- Demonstrate knowledge of how to use various methods of cash forecasting and how to prepare a cash flow analysis for a school district.
- Recognize procedures and legal constraints related to cash collection and disbursements.
- Recognize types, limitations, and benefits of various short-term financing instruments available to school districts.
- Demonstrate understanding of processes, methods, and legal constraints related to issuing long-term general obligation bonds (e.g., bond rating process, role of rating services).
- Demonstrate understanding of the concept of appropriate fund balance management.

0012 Understand purchasing procedures.

For example:

- Demonstrate knowledge of appropriate purchasing procedures (e.g., requisitioning and approving equipment purchases).
- Demonstrate understanding of how to apply accounting principles and procedures to the bidding and purchasing processes.
- Demonstrate understanding of legal and ethical considerations related to bidding, purchasing, and working with vendors.
- Recognize procedures for using computerized management systems to generate and track requisitions, purchase orders, deliveries, invoices, and payments relative to the status of the budget.

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0013 Understand supply and fixed asset management procedures.

For example:

- Demonstrate understanding of supply and fixed asset management procedures.
- Recognize principles and procedures for inventory management and control.
- Identify types and benefits of quality control methods.
- Identify techniques for producing, using, and interpreting financial analyses of life cycle costs.
- Demonstrate knowledge of how to plan and implement a program for the maintenance and repair of equipment.
- Recognize procedures related to the legal aspects of the disposal of surplus equipment.
- Demonstrate knowledge of amortization techniques pertaining to new and replacement capital equipment.

0014 Understand real estate management procedures.

For example:

- Demonstrate knowledge of legal principles and procedures for acquiring and disposing of school district land and buildings.
- Demonstrate understanding of how to collaborate with governmental agencies regarding zoning issues, long-range land use planning, and the effect of commercial and residential development on schools.
- Demonstrate knowledge of proper real estate management policies, procedures, and practices in the context of school-related business.
- Identify procedures for managing the fixed assets of an educational institution (e.g., using a computer program or service).

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0015 Understand risk management procedures.

For example:

- Recognize characteristics, benefits, and limitations of common types of insurance protection, including insurance cooperatives.
- Demonstrate understanding of federal and state statutes related to liability limits and bond requirements.
- Describe procedures for assessing potential safety hazards in school buildings and on school grounds.
- Identify techniques for and benefits of providing education on risk management issues to school district personnel.
- Recognize methods and models for evaluating a risk management program of a school district.

SUBAREA III—SCHOOL ORGANIZATION, SERVICES, OPERATIONS, AND SAFETY

0016 Understand theories of public education policy and intergovernmental relations.

For example:

- Demonstrate understanding of the educational policies, functions, and roles of state boards of education, state legislatures, municipal governments, and the federal government.
- Identify the structure and functions of school governance at the district level (e.g., local boards of education).
- Demonstrate understanding of the relationship between the chief school business official and the local board of education.
- Demonstrate understanding of the role, including limitations, of special interest groups within a school district and their ability to influence those who approve district policy.

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0017 Understand human resource management procedures for noninstructional personnel.

For example:

- Demonstrate knowledge of principles, processes, legal factors, and interpersonal skills involved in recruiting, screening, hiring, orienting, assigning, and terminating noninstructional personnel.
- Demonstrate understanding of the ways in which school board policies and state and federal employment laws influence human resource management for noninstructional personnel.
- Demonstrate knowledge of staff development procedures for noninstructional personnel (e.g., identifying staff development priorities, incorporating components of adult learning into an effective sequential process of staff development).
- Recognize effective skills and procedures for administering and evaluating a comprehensive staff development program for noninstructional employees (e.g., identifying models of staff development, completing a cost analysis of the program).
- Demonstrate understanding of strategies and considerations involved in bidding, selecting, evaluating, and managing employee benefits programs for noninstructional personnel.
- Demonstrate understanding of the legal requirements and tax consequences of employee benefits programs for noninstructional personnel.
- Recognize the need for subordinates to understand the expectations included in board policy as well as in state and federal laws.

0018 Understand labor relations and collective bargaining issues.

For example:

- Demonstrate understanding of board of education policies and state statutes regarding collective negotiations.
- Recognize principles and procedures involved in establishing a board of education's negotiation team and developing strategies for conducting negotiating sessions.
- Demonstrate knowledge of principles, strategies, and skills for improving relations between management and district employees.
- Demonstrate knowledge of procedures and considerations involved in developing salary schedules and benefits packages.
- Demonstrate understanding of models for assessing the costs of salary and benefits proposals.

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0019 Understand school facilities planning and construction procedures.

For example:

- Identify steps and procedures for developing a strategic plan for school facilities, including population projections and current building evaluations.
- Recognize funding sources and issues related to school construction (e.g., bond ratings, rating process, bond election process, amortization of bond issues).
- Demonstrate knowledge of procedures for selecting and using the services of architects, engineers, risk managers, construction managers, general contractors, and other professionals.
- Demonstrate understanding of the legal and administrative responsibilities of advertising, awarding, and managing construction contracts (e.g., contractor bankruptcy, product failure, poor workmanship).
- Demonstrate knowledge of protocols and procedures involved in developing and using educational specifications and selecting school sites.
- Demonstrate understanding of current research, practices, and issues related to the effects of energy, safety, and environmental factors on facility planning and construction.
- Demonstrate understanding of the legal contexts in which school facilities are planned, constructed, and operated, and the roles of the various governmental agencies involved in the process.

0020 Understand maintenance, operations, and security procedures for school buildings.

For example:

- Demonstrate knowledge of principles and procedures for keeping schools clean and safe for students, staff, and community through routine custodial services and preventive and remedial maintenance (e.g., asbestos abatement, radon gas, lead, mold, air quality and other contaminants).
- Demonstrate knowledge of skills and techniques involved in calculating custodial allocations, making resource allocation decisions based on maintenance and operation functions, and developing staffing plans for maintenance divisions of school districts.
- Recognize protocols and procedures for managing and financing energy consumption efficiently and effectively.
- Describe procedures for implementing a school disaster preparedness and recovery plan.

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0021 Understand school transportation services, food services, and health and safety services.

For example:

- Recognize methods of providing transportation for students, criteria for developing transportation routes and schedules, and principles and techniques for selecting and training district transportation staff.
- Demonstrate knowledge of effective management strategies for the maintenance and operation of a safe district transportation program.
- Demonstrate knowledge of principles and procedures for developing an effective system of high-quality food services (e.g., interacting with nutritional and regulatory agencies in planning, conducting, and reporting on food service programs).
- Demonstrate understanding of the legal and financial aspects of school food services (e.g., state and federal guidelines for free and reduced-price meals, revenue and expenses, budgeting and reporting).
- Demonstrate knowledge of major components of a health and safety program and methods for establishing health and safety policies and administrative procedures for students, employees, and the community that comply with federal and state regulations.
- Recognize principles and techniques for developing and implementing district policies related to students and staff infected with contagious diseases.
- Identify training procedures designed to increase school employees' awareness of dangerous environmental factors.