

SECTION II: REQUIREMENTS FOR CERTIFICATION

General Requirements

The following requirements are common to all levels of TASBO certification:

1. As of May 1, 2005, TASBO membership is no longer required to become TASBO certified.
2. An individual must be currently working in a public or non-public school or qualifying organization (see Appendix D) at the time application for certification is filed and approved.
3. At the time of application for certification, submit a letter of recommendation from the applicant's Superintendent, Chief School Business Administrator, Board President, or equivalent supervising administrator regarding the applicant's:
 - a. Integrity
 - b. Character
 - c. Ethical Behavior
 - d. Efficiency and competency on the job.
4. Complete the required coursework track.
5. Submit a completed Official Letter of Transmittal and an Application for Certification Status on forms provided by TASBO, including signed Code of Ethics.
6. Substitute courses must be approved, in advance, by the appropriate research committee and the TASBO Certification Committee. (No more than two substitutions will be allowed for all certification levels combined.)
7. Each level of certification requires a minimum number of courses taken in a classroom setting. Certification can not be earned through online courses only.
8. Course credit earned under any certification level may be credited toward any higher certification level, where applicable. (i.e., an individual does not have to take a course twice).
9. As of January 1, 2007, MGT307: Business Ethics is a required course for all levels of TASBO certification.

Areas of Specialization

Certification courses are based on these areas of specialization: Accounting, Distribution & Inventory, Maintenance and Operations, Information Technology, Information Technology Management, Payroll, PEIMS, Personnel, Purchasing and Supply Management, Risk Management, Safe Schools, School Nutrition, Textbooks and Transportation. **(Management courses are also provided but are not considered an area of specialization.)**

School Business Experience

The definition of school business experience is an individual whose primary job responsibility is school business and/or operations. The following is to be considered as a guide for determining an individual's school business experience:

- The function code, as defined by the Financial Accountability System Resource Guide (FASRG), used for the individual's pay (this may exclude functions 11, 12, 13, 21, 23, 31, 32, 33, 36, and 61).
- The individual's job must relate to the Components and Competencies (see Appendix E).
- A significant amount of the individual's time, defined as a minimum of 7-hours per day for 90 working days, or equivalent to at least 630 hours of the TASBO fiscal year, is spent in Texas school business and/or operations area of responsibility.
- Any questions or clarifications related to the definition are submitted by the Education Specialist to the Certification Committee for review and action.

Provisional Certificate Requirements

A candidate may apply for a provisional certificate in any of the three levels of certification if all requirements for full certification are met with the exception of years of experience. The applicant is to submit a completed Official Letter of Transmittal and an Application for Certification Status on forms provided by TASBO, in addition to a written request for provisional certification. The holder of a provisional certificate may not use the letter designation after their signature.

To receive full certification, a person holding a provisional certificate must complete the school business and/or operations experience as stated under the requirements for a certificate. Full certification will be granted after TASBO certification staff is provided with documentation showing that the years of experience requirements have been met.

Requirements for CTSBS^{cm} (Certified Texas School Business Specialist)

Applicant Must:

1. Meet all general requirements for certification.
2. Have two years of school business and/or operations experience.
3. A minimum of 2 TASBO certification courses must be taken in a classroom setting.

Course Requirements:

1. A total of seven courses must be completed
2. Four courses must be taken from one area of specialization in the TASBO curriculum. Management is **not** an area of specialization.
3. The remaining three courses must include MGT307: Business Ethics and two courses from any of the TASBO curriculum.

Requirements for CTSBO^{cm} (Certified Texas School Business Official)

Applicant Must:

1. Meet all general requirements for certification.
2. Have three years of school business and/or operations experience, with at least two consecutive years in one district or qualifying organization.
3. A minimum of 4 TASBO certification courses must be taken in a classroom setting.

Course Requirements:

1. A total of ten courses must be completed.
2. Three courses must be taken from each of three different areas of specialization in the TASBO curriculum (total of nine courses). Management is **not** an area of specialization.
3. The tenth course must be MGT307: Business Ethics
4. A project may substitute for three courses in one area of specialization. (See Project Guidelines and Requirements on page 10.) A fee will be assessed for this substitution.

Requirements for RTSBA^{cm}

(Registered Texas School Business Administrator)

Applicant Must:

1. Meet all general requirements for certification.
2. Have at least a bachelor's degree from an accredited college or university.
3. Have five years of school business and/or operations experience, with at least three consecutive years in one district or qualifying organization.
4. A minimum of 6 TASBO certification courses must be taken in a classroom setting.

Course Requirements:

1. A total of fifteen courses must be completed
2. Eight specific courses must be taken, including:
 - a. Management 301: Functions and Duties of School Business Administrator
 - b. Management 303: Approaches to Management and Leadership
 - c. Management 306: Board Policies and Administrative Procedures
 - d. Management 307: Business Ethics
 - e. Management 308: Effective Communications
 - f. Management 309: Business Administration and the Law
 - g. Management 310: Long-Range Planning
 - h. One of the following courses:
 - i. Management 317: Financial Essentials for Non-Accountants
 - ii. Management 318: Cost Accounting for Accountants
3. Seven other courses must be taken from any of the TASBO curriculum.

Endorsement Requirements: (Optional)

Definition:

An endorsement is a special designation on the RTSBA^{cm} certificate that signifies that an individual has sufficient experience and training in an area of specialization, so that a prospective employer could reasonably be assured that the person has the potential to serve in a supervisory capacity in that area of specialization.

Requirements:

1. Four courses must be taken in one area of specialization. These courses can be part of the eight non-management courses required for the RTSBA^{cm}.
2. The applicant must have at least three years of work experience in the area of endorsement.
3. A project is required for each endorsement. (See Project Guidelines and Requirements on page 10.) A project completed for the CTSBO^{cm} may also satisfy the endorsement requirement for the RTSBA^{cm}, but only in the area of specialization related to the project and only if completed within the 3-year period prior to the date of the endorsement request. A fee will be assessed for each project.

CTSBA Certification

(Certified Texas School Business Administrator)

Effective January 1, 2000, the CTSBA (Certified Texas School Business Administrator) is no longer available; however, those individuals who have already earned the CTSBA may continue to use that designation as long as they maintain their continuing education requirements. If a holder of the CTSBA earns the RTSBA^{cm}, the RTSBA^{cm} will supersede.

Certification Renewal Requirements

All certificates shall be valid for three years from the date granted. All RTSBA^{cm}, CTSBA, CTSBO^{cm}, or CTSBS^{cm} certificates will be renewed upon completion of 60 clock hours of continuing education every three years.

Project Guidelines and Requirements

A project is not required for any certification. However, a project may be used to substitute for three courses in one area of specialization for the CTSBO^{cm}. A project is only required if an individual wishes to add an endorsement to an RTSBA^{cm} certificate. See Requirements for RTSBA^{cm} for more information on endorsements.

Purpose of the Project

A candidate for certification should be able to solve a problem in school business administration through individual study. The purpose of the project is to demonstrate the applicant's problem solving and analytical abilities.

- a. The project should benefit the individual, the school district, or the school business profession.
- b. The project should demonstrate the candidate's ability to study a particular problem.
- c. The project may lend itself to adding to the body of knowledge in school business administration.

Guidelines

1. The candidate is to declare in writing to the TASBO Education Coordinator, his/her intention to begin a project. Candidate should include the certification desired and the area of specialization if applicable.
2. If the candidate previously developed a work-related project that he/she wishes to submit for review, the project must have been completed within the 3 year period prior to the date of submission for review.
3. The TASBO certification department identifies, selects, and assigns a review panel made up of practitioners in that area of specialization. TASBO then notifies each candidate in writing of the review panel members. This letter will also include information on formatting, purpose of the project, and suggested methodologies that may be used.
4. The candidate is responsible for contacting the review panel lead person to arrange for submission of the general description of the project for approval. The panel has 45 days from the receipt of the general description until it is returned with approval or modifications.

5. Review panel members are responsible for maintaining a copy of the changes the candidate is being asked to make.
6. Once the review panel has authorized the project, the candidate may begin the project. The candidate has 24 months from the time of project authorization to complete the project. Time extensions may be granted by each review panel on a case by case basis.
7. Upon final approval, two copies of the project must be sent to the TASBO certification department.

Methodologies

There are three primary approaches a candidate may take for studying a topic or problem. They are as follows:

1. **Historical Perspective** - An historical perspective might approach a topic from the standpoint of what has occurred over a period of time. For example, a candidate might study and document the history of educational funding in Texas, beginning with the pre-Civil War era to present. A detailed history of the various structures of the funding system and its evolution from its origins to its current complex structure would be educational and informative to any school business official in this state.
2. **Issue Analysis** - An issue analysis approach consists of identifying the issue(s) and analyzing and evaluating alternatives. It would not be mandatory to make a recommendation of one alternative over the other. An example would be to address the alternative of a compensating balance versus fee for service depository banking contracts.
3. **Statistical Survey** - This method would involve conducting a survey on a specific issue in school business and discussing the findings of the responses. An objective unbiased and well-developed survey form would be developed. For example, conduct a salary survey of several districts to determine external competitiveness.
4. **Other** - Various other methods and approaches are available for use by a candidate. Candidates should discuss with their review panel any methodology to be used.