



Association of School Business Officials of Alberta

Definition of Practice

Secretary Treasurer, Associate Superintendent of Business and Financial Services, Treasurer, Corporate Secretary, Assistant Secretary Treasurer, Manager of Finance, Associate Superintendent of HR, Purchasing Directors, Accountants, School business managers, Communications, Facilities and Transportation directors – are all School Business Officials. School Business Officials may specialize in one particular area of work or they may be responsible for several areas.

This Definition of Practice identifies those areas that a senior school business may be responsible for in their school jurisdiction. It is intended to:

- Assist those currently working in the profession of school business management to perform their duties as expertly as possible.
- Provide a model from which to build certification standards for the profession and to assist jurisdictions in seeking and securing the best person for the school business official position
- Provide a framework for the Association in the development of professional development and training opportunities for members.

In addition to this definition developed by our Certification committee, the Professional Standards Committee from ASBO International developed a publication called “International School Business Management Professional Standards and Code of Ethics.” This publication as well as the ASBOA Definition of Practice is well worth reviewing for those who are in the business, thinking of joining the business or for those who may be thinking of hiring someone for a position in School Business.

[ASBO International Professional Standards and Code of Ethics](#)



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| Skill Set | Skill Dimension | Skill Quotient |
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| Administration | A. Organization and Administration | <ol style="list-style-type: none"> 1. Identify and apply various organizational leadership models 2. Motivate others, delegate, plan and allocate appropriate resources 3. Assign personnel and resources 4. Problem solve, make decisions, adapt to change 5. Collect, analyze and evaluate information 6. Apply basic concepts of organizational development |
| | B. Public Policy and Intergovernmental Relations | <ol style="list-style-type: none"> 1. Develop, interpret, evaluate and apply policy and roles of all relevant authorities 2. Understand the role and influence of special interest groups 3. Understand and analyze the political and legislative process as it relates to local school board elections; municipal governments, provincial legislatures and other government jurisdictions. |
| | C. Legal Issues | <ol style="list-style-type: none"> 1. Identify and apply constitutional rights 2. Review, analyze and apply statutory authority relative to all aspects of the School Business Official 3. Apply personal values clarification and ethical performances as related to the profession |
| | D. Risk Management | <ol style="list-style-type: none"> 1. Ensure that a risk management program exists, addressing safety and security 2. Identify and evaluate potential risk 3. Adhere to legal requirements for insurance 4. Identify and evaluate alternative methods of funding and managing risk 5. Assess risk management programs and recommend needed change 6. Communicate the risk management program to all stakeholders |
| Financial Resource Management | A. Principles of School Finance | <ol style="list-style-type: none"> 1. Apply economic and financial theory 2. Recognize and forecast all sources of revenue 3. Interpret the provincial funding model and analyze the impact of change 4. Identify and evaluate all expenditures |



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| | <p>B. Budgeting and Financial Planning</p> | <ol style="list-style-type: none"> 1. Use multiple approaches to determine enrolment and personnel projections 2. Forecast anticipated revenues and expenditures by program 3. Through various methods, identify and apply budget analysis, and control 4. Apply legal requirements for budget adoption 5. Recognize and explain external influences 6. Maximize available resources |
| | <p>C. Accounting, Auditing and Financial Reporting</p> | <ol style="list-style-type: none"> 1. Establish and verify compliance with finance-related legal and contractual provisions 2. Communicate the relationship between programs, revenues and appropriations of the school district to the stakeholders 3. Prepare, analyze and report financial statements and supporting discussion documents to the board throughout the fiscal year. 4. Prepare a corrective action plan from the information conveyed in the annual audit report to improve financial tracking and reporting and internal controls and guide the implementation of the plan. 5. Apply concepts and standards of accounting relevant to the districts location. 6. Adhere to the accounting standards – setting governing body and prepare financial statements in accordance with the most current standards as issued by such body. 7. Report the financial status of the district to the appropriate provincial agency in the appropriate regulatory format, which may be on a generally accepted accounting basis or on a customized/regulated basis of reporting. |
| | <p>D. Cash Management Investments, and Debt Management</p> | <ol style="list-style-type: none"> 8. Develop specifications and select financial institutions, advisors etc. as required 9. Apply the concept of compensating balances 10. Comply with and understand the legal constraints for cash collection and disbursement 11. Apply cash forecasting 12. Understand the risk of various investments options and debt financing instruments 13. Analyze internal transfers and loans 14. Prepare various cash flow analysis as required |



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| | E. Technology for School Finance Operations | <ol style="list-style-type: none"> 1. Keep current with technology application and programs 2. Assess technology needs related to available financial resources 3. Ensure that the Technology Plan achieves pre-defined goals 4. Develop an Operational Plan to meet the district's financial goals and objectives. 5. Recognize and analyze significant social, demographic and economic changes that may impact the financial plan of the district. 6. Interpret the relevant government funding model. 7. Explore alternative and innovate revenue sources |
| Human Resource Management | A. Personnel and Benefits Administration | <ol style="list-style-type: none"> 1. Facilitate the development and management of an appropriate personnel information management database 2. Manage and evaluate payroll operations 3. Interpret employment agreements 4. Research and explain compensation arrangements 5. Implement employment reductions or terminations as governed by employment agreements and statutory requirements |
| | B. Professional Development | <ol style="list-style-type: none"> 1. Identify and evaluate professional development needs 2. Build and implement professional development, supervision and evaluation system 3. Involve staff in determining their professional development needs 4. Attends appropriate personal and professional development opportunities to contribute to personal and professional growth |
| | C. Labor Relations and Employment Agreements | <ol style="list-style-type: none"> 1. Analyze all local and statutory regulations with respect to employment agreements 2. Develop and analyze methods for assessing salary and benefit packages and proposals 3. Analyze and compare employment agreements with those of other authorities 4. Identify and monitor compliance with grievance procedures 5. Review provincial regulations with respect to mediation and arbitration |



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| | D. Human Relations | <ol style="list-style-type: none"> 1. Diagnose, and maintain employee wellness and/or employee assistance programs 2. Develop, interpret and apply personnel policies and procedures 3. Assist with recruitment, selection, orientation, assignment, evaluation and termination of personnel 4. Identify and implement conflict resolution and team building procedures 5. Recognize and promote standards of ethical behaviour and professional conduct 6. Stay current with management theory and leadership styles |
| Facility Management | A. Planning and Construction | <ol style="list-style-type: none"> 1. Member of the planning team to develop a long range facility plan 2. Develop a working knowledge of funding sources and issues relating to facility construction 3. Develop procedures for selecting applicable professionals 4. Apply school site educational specifications 5. Ensure statutory regulations regarding advertising, awarding and managing construction projects are adhered to 6. Recognize the impact of energy and environmental factors 7. Meet statutory requirements regarding construction and renovation projects |
| | B. Maintenance and Operations | <ol style="list-style-type: none"> 1. Administer procedures required to keep facilities clean, safe and secure 2. Manage energy consumption and environmental aspects 3. Determine resource allocation for maintenance and operations 4. Develop a crisis management plan 5. Maintain a positive relationship with staff, contractors, and suppliers |
| Property Acquisition and Management | A. Purchasing | <ol style="list-style-type: none"> 1. Apply generally accepted practices and procedures in the purchasing process 2. Administer an integrated electronic management system to maintain the purchasing process 3. Formulate bid requirements for specifications, advertisements, and selection 4. Analyze e-procurement issues |
| | B. Supply and Fixed Asset Management | <ol style="list-style-type: none"> 1. Develop a system to manage and track inventory 2. Develop a program for acquisition, maintenance, repair and disposal of equipment 3. Develop a system for the financial analysis of life cycle costs and quality control 4. Develop a system to track capital assets |



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| | C. Real Estate Management | <ol style="list-style-type: none"> 1. Develop procedures for the acquisition and disposal of land and buildings 2. Coordinate with government agencies regarding zoning, land use and other real estate issues 3. Adhere to real estate management policies and procedures |
| Information Management | A. Strategic Planning | <ol style="list-style-type: none"> 1. Participate in the development of short and long term goals 2. Assist with the development and communication of a vision of the preferred future 3. Assist with the development, implementation, monitoring, reporting and evaluation of a strategic plan |
| | B. Instructional Support Program Evaluation | <ol style="list-style-type: none"> 1. Evaluate programs and business services 2. Identify economic and cost factors in program operation and evaluation 3. Develop, analyze, and apply methods to measure program outcomes and effectiveness 4. Manage change when evaluation determines it is necessary |
| | C. Instructional Program Evaluation | <ol style="list-style-type: none"> 1. Support the components of instructional programs 2. Participate in the planning and implementation of program improvement 3. Analyze economic factors associated with instructional program delivery and evaluation 4. Evaluate the cost effectiveness of instructional programs 5. Utilize evaluation data toward the development of change 6. Assist with the allocation of resources for instructional programs and applicable professional development activities |
| | D. Communications | <ol style="list-style-type: none"> 1. Comprehend, assist in the development of and apply communication strategies and techniques for the jurisdiction 2. Understand the components of public information management and public relations 3. Understand the major constituencies within the authority 4. Develop and use appropriate presentation skills/strategies to present financial data as required to various stakeholders |



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| | E. Management Information Systems | <ol style="list-style-type: none"> 1. Direct or develop management information systems 2. Apply current technology to the storage, security, analysis and communication of data 3. Evaluate the cost benefit of information in relation to organizational value 4. Develop a records management system that complies with legal requirements 5. Develop a database that facilitates decision making 6. Administer a computerized management system 7. Assist and coordinate the gathering and reporting of information for statutory reports 8. Maintain the historical record archive 9. Assist with the development, evaluation, implementation and use of technology in areas of responsibility 10. Direct or develop plans for internet use 11. Assist with long range technology planning 12. Promote and assist with technology training 13. Allocate financial resources and specifications pertaining to the purchase of applicable technology |
| Transportation | Transportation | <ol style="list-style-type: none"> 1. Support and maintain a transportation program that adheres to all legal requirements 2. Ensure that a bus maintenance and replacement program is established and maintained 3. Monitor the transportation system and make adjustments as necessary 4. Analyze alternative transportation methods 5. Ensure an efficient and comprehensive routing system is developed and maintained 6. Ensure a plan is in place for training and retaining drivers 7. Communicate transportation needs to all stakeholders |