

CASBO Chief Business Official (CBO) Certification Exam Blueprint ©

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Domain 1: Accounting	8%
Domain 2: Facilities and Debt Financing	11%
Domain 3: Human Resources and Collective Bargaining	9%
Domain 4: Information and Technology Services	3%
Domain 5: Leadership and Governance	17%
Domain 6: Principles of School Law	5%
Domain 7: Public Relations	5%
Domain 8: Risk Management	4%
Domain 9: Operations	15%
Domain 10: Finance and Budget	18%
Domain 11: Special Education	5%

Domain 1: Accounting 8%

The accounting process includes summarizing, analyzing, and reporting transactions to oversight agencies, regulators, auditors, and other interested entities. This also includes developing and maintaining internal controls to mitigate opportunities for fraud.

- 1.1 Guide the audit process
- 1.2 Monitor program and regulatory reporting
- 1.3 Oversee the preparation of revenue, expenditure, and cash flow projections
- 1.4 Coordinate year end closing

Domain 2: Facilities and Debt Financing 11%

Facilities encompass management of the construction and modernization of all buildings and structures. Most local education agencies (LEAs) have a need to incur and manage debt that might include Certificates of Participation (COPs), Tax Revenue Anticipation Notes (TRANS) and other debt instruments involving use of bond counsel, financial advisors and underwriters. Planning for facilities involves enrollment projections plus collaboration with city leadership and developers to prepare to accommodate student growth.

- 2.1 Design a facility master plan and developer fee justification analysis
- 2.2 Formulate a long-term plan for facility construction financing
- 2.3 Implement commonly used debt instruments
- 2.4 Communicate with education partners on facility and debt needs

Domain 3: Human Resources and Collective Bargaining**9%**

Personnel comprises approximately 80% of a district's general fund budget. Leading efficient, effective human resources and understanding the collective bargaining process are essential to ensuring the LEA can attract, hire and retain high-quality staff who support the functions of the LEA.

- 3.1 Prepare transparent negotiation documents, such as: Cost of 1%, Step and Column, and Multi-Year Projections
- 3.2 Develop Staffing Ratios appropriate for all sites
- 3.3 Apply all applicable laws and collective bargaining agreements regarding hiring, layoffs, termination and progressive discipline

Domain 4: Information and Technology Services**3%**

Information and Technology (IT) services span business and education applications for the LEA. IT has a key role in federal and state reporting, data analysis and secure management of information systems, E-Rate and network infrastructure.

- 4.1 Implement the E-Rate process to offset costs of technology infrastructure
- 4.2 Comprehend the role of technology in the overall LEA plan
- 4.3 Ensure data privacy and security

Domain 5: Leadership and Governance**17%**

Personal leadership is the art of motivating a person or group to achieve a common goal or objective. Organizational leadership expands the concept to include development of effective strategies to meet the needs of the entity. The concerns/desires of all education partners are taken into consideration. Board governance and cultivating productive relationships with the board (or other governing bodies) are also elements of leadership.

- 5.1 Maintain a 'students first' mindset in all decisions
- 5.2 Communicate transparent, complex data to education partners and the community while listening to input and taking it under advisement
- 5.3 Work as a team with Superintendent and other department leaders to carry forth the established goals and objectives
- 5.4 Develop staff to build organizational capacity
- 5.5 Lead by example and demonstrate ethics
- 5.6 Provide guidance and support to the Superintendent, posting and running of school board meetings in compliance with the Brown Act

Domain 6: Principles of School Law**5%**

LEA policies and procedures must conform with the laws and regulations contained in the California Education Code and the Government Code as well as other local, state and federal regulations.

- 6.1 Review and facilitate responses regarding the Public Records Act
- 6.2 Direct all areas of the Business Department to follow the applicable board policy, laws, statutes, codes and regulations
- 6.3 Ensure contracts contain necessary provisions and insurance requirements
- 6.4 Assess any charter school petitions and agreement requirements

Domain 7: Public Relations**5%**

Public relations is a strategic communication process that builds beneficial and positive relationships between organizations and their constituents, partners and communities.

- 7.1 Lead public discussions regarding the Local Control Accountability Plan (LCAP) and district budget
- 7.2 Construct comprehensive, concise presentations and public messages regarding finance and school business operations
- 7.3 Engage community involvement in budget committees and oversight boards

Domain 8: Risk Management**4%**

Risk management is the process by which LEAs forecast and evaluate financial risks while also identifying procedures that avoid or minimize impact, damages and any potential liabilities.

- 8.1 Collaborate on the development of district-wide and site safety plans to include appropriate drills (disaster, active shooter, fire, etc.)
- 8.2 Minimize risk by ensuring well maintained facilities and safe and secure learning environments
- 8.3 Evaluate risk management programs

Domain 9: Operations**15%**

Operations encompasses multiple disciplines and departments, including: Maintenance and Operations, Child Nutrition, Transportation, and Procurement. A CBO comprehends responsibilities of each department, leads collaborative efforts between teams, and has knowledge of related laws, regulations, and funding/expenditure requirements.

- 9.1 Develop a comprehensive maintenance and cleaning plan for all district and school facilities
- 9.2 Ensure facilities comply with the Williams Act
- 9.3 Implement State and Federal meal plan and nutritional requirement guidelines
- 9.4 Analyze pupil transportation needs with routes and resolve transportation related problems
- 9.5 Oversee the purchasing process, contracts, bid specifications and major purchases

Domain 10: Finance and Budget**18%**

Finance and Budget includes responsibility for providing timely communications of accurate financial and budget information. Knowledge of the current state of the economy and the state budget process as it relates to education funding are critical.

- 10.1 Educate education partners on the current economic outlook and the potential impact to the LEA
- 10.2 Communicate regularly to education partners regarding the state budget, the LEA budget and allocations
- 10.3 Consider all major funding sources including Proposition 98, state and federal grants, and local funding
- 10.4 Develop a spending plan to reflect the LCAP, district vision, strategic goals and equitable allocation of available resources
- 10.5 Lead budget committees
- 10.6 Analyze budget assumptions, allocation methodologies, district financial statements and the multi-year projection
- 10.7 Provide guidance and appropriate reserve amounts and fiscal solvency

Domain 11: Special Education**5%**

Management of resources dedicated to Special Education involves the business office at a variety of levels within and outside the LEA. All children have access to free and equal education under the law. Programs developed for students with disabilities must comply with the federal Individuals with Disabilities Education Act (IDEA) and include guidelines for identification, monitoring and reclassification of students into a system that delivers instruction and support.

- 11.1 Comply with Special Education legal and fiscal requirements
- 11.2 Understand the role of the SELPA with input on fiscal allocation methodologies
- 11.3 Strategize to minimize the impact of Special Education costs while also adhering to Maintenance of Effort (MOE) requirements

Questions about CASBO credential programs?

Contact CASBO at certification@casbo.org or call (916) 447-3783