

# ASBO International's Professional Self-Assessments—Mapping Skills, Charting a Course for Growth

**A**SBO International published its landmark *Professional Standards* document in the summer of 2001, identifying seven major skill sets in the profession and setting standards for school business officials in a wide range of positions. ASBO has taken these standards to the next level, creating a set of self-assessments from the *Professional Standards* booklet that personalize the process and allow greater flexibility for individual assessments.

ASBO International's *Professional Standards* are, in part, intended to assist those currently working in the pro-

fession of school business management to perform their duties as expertly as possible and to aid local decision-makers in seeking and securing the best people for new positions. The *Professional Standards* booklet builds upon concepts distilled from decades of study and research, adding recent articles from the field and the input of highly trained and well-recognized school business officials. These standards can be used to assist training institutions, accrediting agencies, certifying entities, and members of the school business profession to define and achieve educational excellence.

School business officials must have an efficient and flexible framework to understand and structure their own complex responsibilities, enabling them to meet the day-to-day challenges of an increasingly demanding and diverse clientele. The skill checklists from the *Professional Standards* have been custom-tailored as a set of freestanding tools that can easily be used by any school manager on an ongoing basis.

A successful school business manager must have specific knowledge and skills gained through past experience, formal education, or professional development. However, to be a professional, an individual must be willing to continually acquire new skills and knowledge. The goal is to discharge job duties not just as an automaton, but also as a *reflective* practitioner. This requires knowledge that is par-

ticular to the task at hand in addition to knowledge of self—knowledge that in turn asks for assessment and feedback from knowledgeable and well informed and peers.

*Knowledge* in a very general sense can be divided roughly into four categories, based on what you know and skills you may have, compared with whether you are aware of your actual knowledge or deficit:

1. What you are aware that you know (your known abilities)
2. What you are aware that you do not know (your known limits)
3. What you are not aware that you know (your hidden abilities)
4. What you are not aware that you do not know (your hidden limits)

ASBO's new self-assessment tools will help school business officials classify their knowledge and abilities, and will be helpful in recognizing skill areas in everyday work that may not have been known areas to need improvement. These tools allow them to review school management practices, discover individual strengths, and identify opportunities for professional development.

Each of the seven major skill sets in *ASBO International's Professional Standards* has been adapted as both a Self-Assessment document and a companion Observer Assessment. Each assessment contains the same set of questions across a range of school management practices (see Figure 1). The process is intended for personal use,




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**Figure 1. ASBO International Self-Assessment of Professional Standards  
Example Using Skill Set 2, Skill Dimension C**

## 2. FINANCIAL RESOURCE MANAGEMENT SKILL SET

Instructions:

1. Read each behavioral statement within the skill dimensions and circle the number for each item as it best describes your behavior along the given scale. Be honest with yourself—remember that this self-assessment is intended for your personal use.
2. At the end of each chart, total the numbers you have circled, divide the total by the number of questions in that chart, and enter the total as the Skill Quotient for that particular skill dimension.

C. Accounting, Auditing, and Financial Reporting:

The school business official understands and demonstrates the ability to perform the following:

1 = Almost Never    2 = Rarely    3 = Occasionally    4 = Frequently    5 = Almost Always    NA = Not Applicable

1. I use an internal and/or an external auditor.	1	2	3	4	5	NA
2. I establish and verify compliance with finance-related legal and contractual provisions.	1	2	3	4	5	NA
3. I communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders.	1	2	3	4	5	NA
4. I prepare, analyze, and report financial statements and support documents to the board of education periodically.	1	2	3	4	5	NA
5. I use information conveyed in the annual audit report to improve financial tracking and reporting and internal controls.	1	2	3	4	5	NA
6. I apply concepts and standards of accounting, the Governmental Accounting Standards Board (GASB), and generally accepted accounting principals (GAAP), along with other standards applicable to a school district.	1	2	3	4	5	NA
7. I report the financial status of the district to the appropriate state/provincial agency.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:	Accounting, Auditing, and Financial Reporting Skill Quotient: _____					

allowing individuals to conduct a self-assessment on their own or in tandem with other school business professionals.

The Observer Assessments allow colleagues who are familiar with the participant's current job responsibilities and work to assess their practices fairly and objectively. The mentors, colleagues, or other professionals who will receive the Observer Assessments should be chosen carefully. Once Observer Assessments are complete, they are to be compared to the original Self-Assessment using a Skills Analysis Sheet.

The purpose of using these documents together is to help form a realistic picture of current skill levels. Honest appraisals should be given of current practices and on-the-job behavior as they relate to each skill dimension. It is crucial to the process that participants are candid in their assessments. However, it is just as important to be aware that answers on the evaluation are not vague measures of merit as a school manager—they are specific tools to lead to a more complete awareness of skill levels and should be used to set practical goals for professional development.

The scale at the top of each skill dimension should be followed as closely as possible to realistically assess how fully and successfully those individual skills are used on the job. A score of *one* on a particular item may only mean that the job *almost never* requires use of that skill. Tasks that are performed frequently with efficiency and ease might rate a higher score of *four* or *five*. Tasks that belong exclusively to other members of a team might not be applicable for an individual assessment.

After personal job practices have been rated on the Self-Assessment charts, a *Skill Quotient* will be determined for each skill dimension. These numbers should be included on the Skill Analysis Sheet (see Figure 2). If Observer Assessments have been collected, the same will be done with colleague ratings.

Finally, using the totals on the Skill Analysis Sheet, subtract the Observer Average from the self-assessed Skill Quotient and enter the difference into the final column on the chart. By comparing the self-assessed Skill Quotient with the average of those from other observers, there should

Figure 2. ASBO International Self-Assessment of Professional Standards  
Example Using Skill Set 2

### PROFESSIONAL ASSESSMENT SKILL ANALYSIS SHEET

Instructions:

1. Using your completed Self-Assessment, take the Skill Quotient calculated at the end of each Skill Dimension and copy it into the Skill Quotient column in the analysis chart below.
2. When you have collected Observer Assessments from all the colleagues to whom they were given, average their Skill Quotients along each Skill Dimension and enter the mean for each into the Observer Average column below.
3. Finally, for each Skill Dimension below, subtract the Observer Average from your own self-assessed Skill Quotient, and enter the Difference into the final column on the chart. Include any negative numbers which may occur.

Skill Set	Skill Dimension	Skill Quotient	Observer Average	Difference
2. Financial Resource Management	A. Principles of School Finance			
	B. Budgeting and Financial Planning			
	C. Accounting, Auditing, and Financial Reporting			
	D. Cash Management, Investments, and Debt Management			
	E. Technology for School Finance Operations			

be a clear picture of the participant's skill levels and how these abilities come across to others.

Study the results in the final column of the chart. Differences of plus or minus several points may indicate areas to focus on for professional development. The following questions may be considered:

- If there are skill dimensions where others see you performing better than you see yourself, what does this tell you about those hidden abilities which you might not be using to maximum effect?
- In which areas have you assessed yourself more highly than your observers have perceived? Are these areas in which you are ready to seek out new training opportunities or refresher courses? Are there workshops or seminars that you can attend in the near future?
- What specific goals do you wish to accomplish in resolving the differences between your assessment and that of your colleagues?
- What timeline will you set for yourself to check the progress in your professional improvement?

Once new learning opportunities have been identified, participants should consider writing out a brief professional growth plan with possible dates and action items.

Committing plans to paper has been shown to be one of the most important steps in following through and accomplishing goals. And, even greater satisfaction will be derived from being able to chart professional growth in the coming months and years.

These self-assessment documents are available from ASBO International as free downloads from the Professional Development section of their Web site at [www.asbointl.org](http://www.asbointl.org). Users are encouraged to download any of the documents they wish to use for their own self-assessments and to share copies with colleagues in school business administration. Working together, the Association and its members can *raise the bar* on professional development and meet the challenges they are faced with in the coming years. ■

#### Bibliography

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- Schon, D. A. (1983). *The reflective practitioner: How professionals think in action*. New York: Basic Books.

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