



Report on International Credentialing

***Submitted by the International Credentialing Task Force
February 2007***

Task Force Formation and Charges

In 2006, ASBO International's Board of Directors agreed to form a task force to examine ASBO International's role in an international credentialing program. The Board asked the task force, in conjunction with a professional consultant, to ascertain the needs of the profession, membership, and affiliates with respect to international credentialing.

The International Credentialing Task Force Members included:

- Chair—Susan L. Lang, Executive Director, Alberta ASBO, Edmonton, Alberta, Canada
- Linda L. Abner, Ed.D., Manager, OK Center for School Business Management, Oklahoma State University, Stillwater, OK
- Jerry Brendel, RSBA, Superintendent, Woodridge School District 68, Woodridge, IL (Board Liaison)
- Dolores M. Cramer, CFO/Treasurer, Marysville Exempted Village School District, Marysville, OH
- Ron Everett, Former Executive Director, IL ASBO, Sugar Grove, IL
- E. Glenn McClain, Jr., Superintendent, Platte Valley SD RE-7, Kersey, CO
- Linda McGhee, CFO, Thomasville City Schools, Thomasville, AL
- Trevor Summerson, National College for School Leadership (NCSL), Nottingham, UK
- Pam Weber, Director of Professional Development, ASBO International, Reston, VA (Staff Liaison)
- Mickie S. Rops, CAE, President, Mickie S. Rops & Associates, Inc. (Consultant)

Specifically, the Task Force's charges were to:

- Examine the need for an international credentialing program in school business management.
- Determine the strengths, weaknesses, opportunities, and threats to ASBO International of developing a program.
- Consider a full-range of options for ASBO's role in developing an international credentialing program and consider how ASBO can best serve its current membership, affiliates, and potential membership.
- Provide at least two international credentialing options that can be used to develop assessment surveys of the profession and membership.

Task Force Process

Guided by the Task Force, Mickie S. Rops, CAE researched and compiled a backgrounder to lay the foundation for the group's discussions. The backgrounder, which is available upon request from Pam Weber, included the following information:

1. Credentialing Primer
 - Credentialing Terminology
 - Legal Ramifications of Credentialing

- International Credentialing
 - Certification Industry Standards
2. ASBO Credentialing Historical Documentation
 - ASBO International. (August 1991). "Guidelines for the Initial Preparation of Chief School Business Administrators." Submitted to the Specialty Areas Studies Board, National Council for the Accreditation of Teacher Education.
 - Everett, Ph.D., Ronald E. & Everett, June B. (March 13, 1988). "Certification and the School Business Official." *School Business Affairs* (March 1988): ASBO International.
 - Everett, Ph.D., Ronald E. (December 1991). "NCATE Accepts ASBO's Guidelines for Preparing Chief School Business Administrator." *School Business Affairs* (Dec. 1991): ASBO International.
 - Everett, Ph.D., Ronald E. & Mastro, L. (September 1994). "Certification – Little Progress for School Business Administration." *School Business Affairs* (September 1994): ASBO International.
 - Everett, Ph.D., Ronald E. (1996). "Professional Standards and Certification Task Force Report." Presented to ASBO International Board of Directors on November 7, 1996.
 - Everett, Ph.D., Ronald E., Glass, Ph.D., Thomas E., & Johnson, Ed.D., Donald R. (Sept. 1998). "Survey Results: Preparing School Business Administrators." *School Business Affairs* (September 1998): ASBO International.
 - Certification: Does it Matter, November 2003
 - Resolution on School Business Official Certification, July 2004
 3. School Business Official: What It Is and What He/She Needs to Know
 - What It Is We Do
 - ASBO International Elevator Speeches
 - Executive Summary: Essential Leadership and Technical Skills for School Business Officials
 - National Association of Independent Schools' Principles of Good Practice
 - How to Become a Bursar (from the U.K.'s ISBA)
 4. ASBO Strategic Plan and International Credentialing Task Force Charge
 - ASBO Strategic Plan
 - International Credentialing Task Force Objectives and Members
 5. Current State of Credentialing for School Business Officials
 - ASBO Standards and Codes of Ethics, Executive Summary and Full Document
 - ASBO Registration Program
 - State Programs
 - International Programs
 6. Models from Other Professions

The Task Force used this information as the basis of its discussion at a meeting in October 2006. At this meeting, the group brainstormed what they believed about the profession (beliefs) and what they knew about the profession (facts) related to the need (or lack thereof) for an international credentialing initiative. Based on these discussions, the group began to form their guiding principles — the underlying beliefs with which any international credentialing initiative would need be consistent in order for it to be recommended to the Board of Directors for consideration.

From October 2006 through January 2007, the Task Force utilized an online community to continue their discussion through reaction to posted questions and documents and building upon each others' thoughts. On January 23th, the Task Force convened by teleconference to discuss several international credentialing options that had arisen through their research and discussion as viable considerations. A significant revelation of that call was that there were at least two populations within ASBO International membership for which distinct credentialing initiatives would be warranted.

International Credentialing Purpose

On February 7th, the Task Force convened for another face-to-face meeting. At this meeting, they confirmed the purpose of the international credentialing: to elevate the status of the school business management profession around the world.

International Credentialing Goals

They identified the goals as:

- Better define the school business management profession (and roles within it)
- Increase the credibility of the school business management profession to school administrators, policymakers and public
- Establish and promote the value of school business officials (SBOs) to school administrators, policymakers and public
- Identify minimum competency standards for school business officials (for various roles)
- Help establish the link between effective school business practices and effective schools
- Establish ways for SBOs to demonstrate their competencies to administrators, policy makers, and the public
- Establish ways for administrators, policy makers and the public to identify competent SBOs
- Prepare current and aspiring SBOs for their roles

They, then, reaffirmed that any credentialing initiative recommended to the Board of Directors would need to be consistent with the following:

Guiding Principles

The credentialing effort must:

- help meet the established international credentialing purpose and goals
- start with a common understanding of the SBO role and competencies across geographical boundaries
- recognize that regional differences exist, and not try to make everyone the same
- meet the needs of both domestic and international SBOs
- complement existing credentialing efforts of ASBO, ASBO affiliates and international bodies
- focus on the professional development of SBOs
- be good for the profession, ASBO, and ASBO membership
- be good for schools and the children attending them
- be within the resource capabilities of ASBO

They then considered several international credentialing options in light of their identified purpose, goals and guiding principles, and it became clear that there were two distinct audiences for which recommendations would be put forth:

- Senior school business officials
- Operations management personnel

Recommendations

The recommendations for each group follow. It is important to note that the Task Force recommends that the Board of Directors consider implementing all the recommendations.

Recommendations: Senior SBOs

- Develop standards and guidelines for ASBO affiliates and partner organizations to develop standards-based licensure/certification and develop a system to recognize those in conformance with standards
- Develop standards and guidelines for senior level curricula for global core competencies as a guide for programming (affiliate, partner organizations, academic)
- Evaluate the registration program in light of the international credentialing goals and recommendations
- Develop global senior level certification

Recommendations: Operations Management Personnel

- Develop global curricula standards and guidelines for professional development of SB operations management personnel
- Evaluate the registration program in light of the international credentialing goals and recommendations

- Research existing, need for, and viability of credentialing mechanisms for operations management personnel

Next Steps

After the Board’s deliberation, the next step would be to solicit stakeholder feedback on the recommendations as approved by the Board. Then, the Board would consider the feedback and determine the feasibility of implementation.

Feedback Phase

In order to gain the feedback needed to make future decisions about ASBO’s credentialing programs, ASBO will conduct an extensive market research plan to solicit input from various key groups. ASBO will hire an outside marketing firm to conduct face-to-face focus groups, electronic surveys, phone interviews, and other feedback mechanism over the course of the next 10 – 12 months. The key audiences for this project include, but are not limited to, ASBO members (school business officials and corporate partners), ASBO affiliates, non-members, superintendents (AASA), school boards (NSBA), colleges and universities, and international partners.

Draft Action Plan

This is a draft of an action plan that would include the key audiences and the feedback mechanisms. Once the task force’s recommendations are approved, a specific timeline will be added, as well as, the results of collaborative work with the outsourced marketing research firm.

	<i>Face-to-face focus groups</i>	<i>Electronic surveys</i>	<i>Phone interviews</i>	<i>Articles/Publications</i>
<i>ASBO members</i>	X	X	X	X
<i>ASBO affiliates</i>	X	X	X	X
<i>Non-members</i>		X	X	
<i>Superintendents</i>	X			X
<i>School Boards</i>	X			X
<i>Colleges and universities</i>	X	X		
<i>International Partners</i>		X	X	X

Budget

The ASBO Board has approved funds for 2007–08 to support the development of the credentialing programs.