

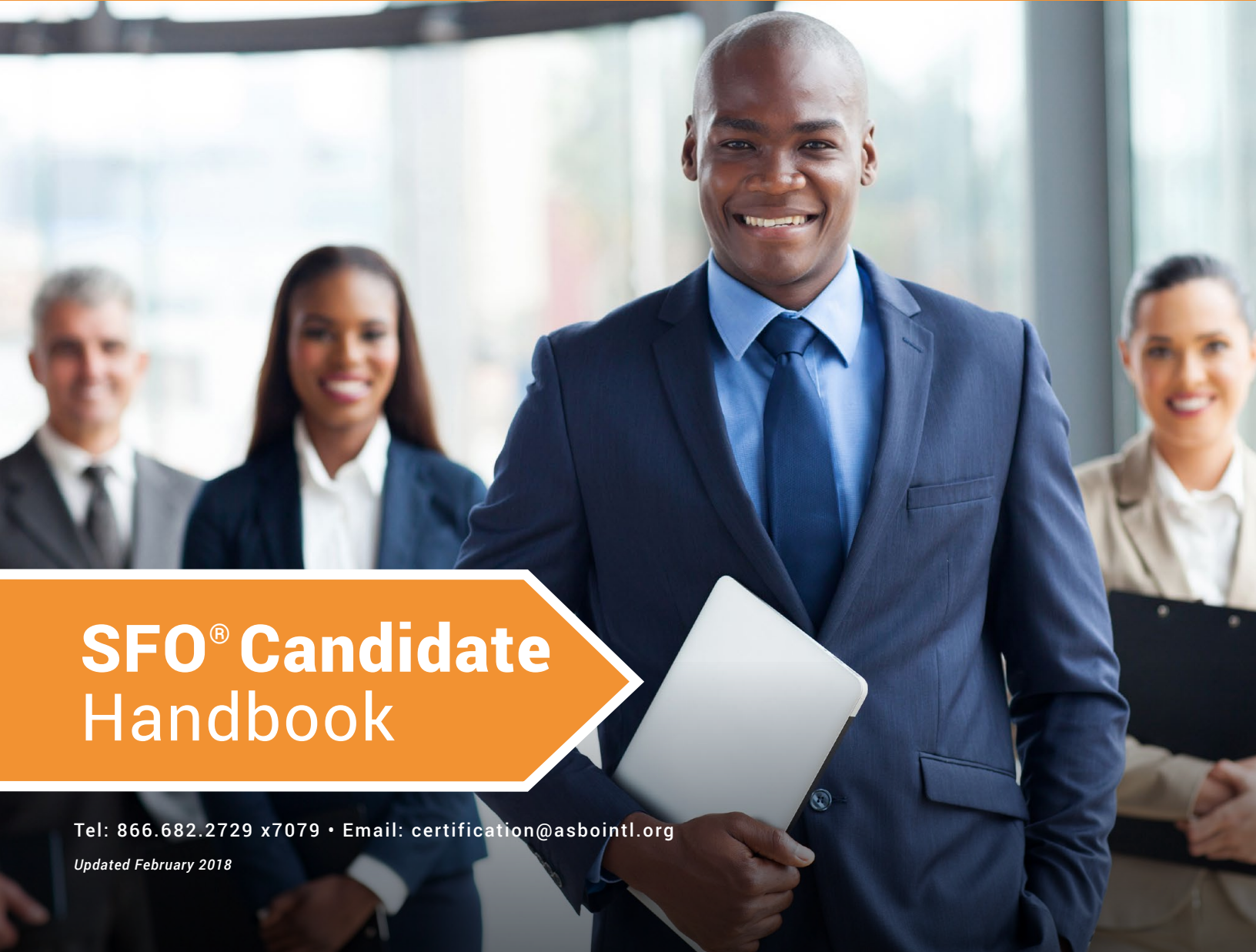


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CERTIFIED ADMINISTRATOR  
OF SCHOOL FINANCE  
AND OPERATIONS

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# ASBO International



## SFO<sup>®</sup> Candidate Handbook

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# Overview

## About ASBO International

Founded in 1910, the Association of School Business Officials International (ASBO) is a nonprofit organization that, through its members and affiliates, represents approximately 30,000 school business professionals worldwide. ASBO International is committed to providing programs, services, and a global network that promote the highest standards in school business. Its members support student achievement through effective resource management in various areas ranging from finance and operations to food services and transportation. Learn more at [asbointl.org](https://asbointl.org).

## Mission and Purpose of Certified Administrator of School Finance and Operations Certification® (SFO®)

The SFO® program is the first nationally recognized certification for school business officials that provides an independent, respected assessment of core industry knowledge requirements. Its mission is to provide a pathway for career recognition by conveying real-world, practical expertise that every school business professional should possess.

The purpose of the certification is to enable governing educational authorities to **objectively** and **readily** identify professionals with proven knowledge and experience in fiscal and operational school business management. Those who have earned the respected credential continue to demonstrate their professionalism and commitment to ongoing learning through recertification.

## Benefits of SFO Certification

School business administrators who have earned the SFO credential elevate their professional stature and earn the respect of their peers. They also have the confidence of knowing their SFO certification is portable nationwide.

Employers can objectively identify professionals with the required knowledge, skills, and experience during their hiring process. They can also readily confirm those employees who have the competitive edge and readiness for career advancement.

## Statement of Non-Discrimination

ASBO International endorses the principles of equal opportunity. Eligibility criteria for examination and certification as a Certified Administrator of School Finance and Operations are applied equally to all individuals regardless of age, race, religion, gender, national origin, veteran status, or disability.

## Statement of Impartiality

ASBO International's certification program is governed by the Certification Commission, a semi-independent certifying body of the Association of School Business Officials International. In adherence to best practices for certifying bodies, Certification Commission volunteers and certification staff are not involved in the development of any preparatory program; also, no preparatory program is endorsed by the Certification Commission nor is it a prerequisite to earn the certification. The Certification Commission and its staff are solely responsible for the policies and administration of the certification program, including application procedures and qualification requirements.

# Application Process

## Overview

Participation in the SFO certification program is voluntary and open to anyone meeting the eligibility requirements. Membership in the Association of School Business Officials International or any of its affiliate organizations is not required.

## SFOs DEMONSTRATE PROFESSIONAL COMPETENCY

Candidates for the SFO designations hold various titles and are representatives of the scope of educational institutions: public, private, and charter schools, and colleges and universities.

## Become an SFO in 3 Easy Steps:

### STEP 1: Meet Eligibility Requirements

Eligibility requires a combination of education and experience; however, candidates who are seasoned practitioners may request eligibility based on experience only. Your eligibility guide:

#### Eligibility Through Education and Experience

A master's degree in a field related to school business management plus two years of experience. Or a bachelor's degree in a field related to school business management with three years of experience. Experience is defined as a school business official in a K-12 or college system, with overall responsibilities that correlate to the exam competencies. See adjacent competency requirements.

#### OR

#### Eligibility as a Seasoned Practitioner

The seasoned practitioner review process allows individuals to use only work experience to meet the eligibility requirement. **To be granted the seasoned practitioner status, an applicant must have been employed as a school business official for a minimum of seven years.**

## Who Should Become An SFO:

- Budget Managers
- Business Managers
- Chief Financial Officers
- Deans/Directors of Finance Operations
- Directors of Finance
- Finance Associates
- State Board Representatives
- Superintendents
- Vice Presidents
- Assistant Superintendents
- Assistant Business Administrators
- Associate Superintendents
- Board Secretaries/Treasurers
- Business Managers
- Business Operations Personnel
- Business Services Personnel
- Chief Business Officers
- Chief Financial Officers
- Chief Operations Officers
- Chief School Finance Officers
- Comptrollers
- Directors of Administrative Services
- Directors of Fiscal Operations
- Executive Directors of Financial Services
- Finance Directors
- Financial Services Supervisors
- Fiscal Officers
- School Business Administrators

## Experience Eligibility Requirements

### Mandatory Competencies

- Managing accounting systems
- Managing accounting functions
- Conducting financial planning and analysis
- Conducting budgeting and reporting activities



### Knowledge in at Least Three Competencies

- Risk management activities
- School facilities
- Information systems
- Human resource functions
- Ancillary services

For more information about each of the above competencies, view the exam content outline.

**Note:** Eligibility documentation is submitted online during the application submission process.

## STEP 2: Submit an Application Online

- Create a profile in the [My SFO Manager](#) online portal.
- Provide education and/or experience requirements. Applicants may use their experience as a seasoned practitioner in lieu of education.
- Agree to the terms of use and Code of Conduct.
- Pay the application and test fee (**\$550 members; \$650 non-members**).

ASBO International does not accept mailed or faxed application forms unless otherwise specified. Application fees are non-refundable. Test fees may be refunded under certain conditions.

### HELPFUL TIP

To have 24/7 access to your application status and to review or make changes to contact details, candidates must create a profile and sign terms of usage agreements. Once an application is approved, the candidate will receive an authorization to test email that confirms eligibility status and provides further instructions about scheduling their exam. Application fees are non-refundable.

### STEP 3: Schedule the Exam

Approved candidates will receive an authorization to test email confirming eligibility status within approximately 7–10 business days. A phone number and link to a website to schedule an appointment for examination is also included in the confirmation email. Candidates must test within one year of the date of their approved application. They should schedule the test within five months of approval, allowing them to retest within the one-year test eligibility window should their first attempt be unsuccessful. Candidates must follow directions on their confirmation email to schedule location, date, and time to test via Pearson Vue centers.

**Note:** *Candidates are responsible for retaining this information as they will receive no further notice.*

### Exam Fees

Member	Non-Member
Application \$150	Application \$250
Exam \$400	Exam \$400
Retesting \$200	Retesting \$200

### Recertification

Once certified, SFOs are required to recertify every 3 years via the My SFO Manager online portal by:

- Earning and documenting 45 contact hours.
- Agreeing to the Code of Conduct.
- Paying a \$300 fee.

See *Recertification Guide* under Policies and Procedures.

#### HELPFUL TIP

All application and recertification materials are available and maintained online via [My SFO Manager](#). ASBO International will not accept mailed or faxed application forms unless otherwise specified.

# Examination

## EXAMINATION SITES

The SFO certification exam is administered as a computer-based test (CBT) at Pearson Vue professional testing centers and their affiliate locations throughout the United States and Canada. For a list of SFO test center locations, administration times, and availability, see [pearsonvue.com/asbo/](http://pearsonvue.com/asbo/).

## EXAM FORMATS

The SFO exam consists of 150 multiple-choice questions covering accounting and school business management competencies. Candidates are presented with a question and are asked to choose the correct answer from the four options provided. Only one answer is correct. There is no penalty assessed for an incorrect answer; points are scored only for correct answers. An exam form may or may not contain pre-test items (unscored test questions), which are allotted for in the exam duration time.

## LANGUAGE

The examinations are offered in English only.

## SPECIAL ACCOMMODATIONS/TEST ADMINISTRATION MODIFICATIONS

Special accommodations to test administration shall be provided to candidates with a disability (as defined by Title III of the Americans with Disabilities Act, the Canadian Federal Disabilities Act, and the Canadian Charter of Human Rights) who submit with their certification application, a written explanation of their needs, along with appropriate medical documentation. Requests must be submitted no less than 6 weeks prior to test date. This is required to allow sufficient time for adequate arrangement to be made on behalf of the test candidate.

Application forms for accommodations are included under the **Forms** section later in this Handbook and provided online at My SFO Manager.



## PREPARING FOR THE EXAMINATION: EXAMINATION CONTENT OUTLINE

<b>Knowledge: Accounting</b>	<b>40% of Exam</b>
<b>Management of Accounting Systems</b>	13.33 %
Accounts Reconcile General Ledger Accounts	
Formulate and Administer the Chart of Accounts	
Analyze and Reconcile General Ledger Accounts	
Manage Risk of District's Investments	
<b>Management of Accounting Functions</b>	26.67%
Manage Payroll Functions	
Manage Accounts Receivable	
Manage Accounts Payable	
Manage Purchasing Procedures	
Create and Monitor Annual Budgets	
Prepare Financial Reports	
Manage Cash Flow	
Provide Accurate and Transparent Reporting	
<b>Knowledge: School Business Management</b>	<b>60% of Exam</b>
<b>Financial Planning and Analysis</b>	15.33%
Serve as a School Leader	
Review Financial Impact of Strategic Planning Goals	
Develop Financial Goals	
Evaluate Funding Options for Debt Management	
Develop Outside Funding Sources	
Analyze Economic and Demographic Data	
Develop Multi-Year Forecast	
Estimate Real Estate Property Tax Revenues	
<b>Budgeting and Reporting Activities</b>	10.67%
Project Student Enrollment	
Evaluate Instructional Program Costs	
Develop Annual Budgets	
Manage Grant Activities	
Prepare for Annual Audit	
<b>Risk Management Activities</b>	7.33%
Evaluate Existing Risks	
Address Results of Risk Audit	
Conduct Annual Evaluation of Insurance Plans	
Manage Insurance Plans	

<b>Management of School Facilities</b>	7.33%
Update Facility Master Plan	
Oversee the Operation and Maintenance of School Campuses	
Oversee New Construction and Renovations	
<b>Management of Information Systems</b>	4%
Assist in Developing a Technology Plan	
Maintain Technology Systems	
Oversee Telecommunication Systems	
<b>Management of Human Resource Functions</b>	10.67%
Manage Hiring of New Employees	
Develop Compensation Structure	
Facilitate Staff Development and Training Programs	
Manage Evaluation Process	
Manage Personnel Administration	
Manage Employee Benefit Programs	
<b>Management of Ancillary Services</b>	4.67%
Manage Transportation Services	
Manage Food Service Programs	

**SFO Exams Are Developed via  
Nationally Recognized Industry Standards.**

The SFO examination conforms to a content outline based on a job task analysis of school business management. A job task analysis is an industry-wide survey that identifies the areas of work-related functions required for effective and efficient performance as a school finance administrator. It must detail and rank the knowledge and skills that are of relative importance in the profession. Exam questions are based on this analysis and it is pivotal in identifying required expertise and performance standards.

# Policies and Procedures

ASBO International is committed to excellence in the administration and maintenance of its SFO certification. Please review policies and procedures and use as a guide to ensure an optimum certification experience.

## Application Eligibility, Retest, and Cancellations

### POSTMARK DEADLINES

All SFO program materials should be submitted through the My SFO Manager online portal, unless otherwise noted by ASBO International. All deadlines set by ASBO International are postmark deadlines. If there is a discrepancy between a metered postmark and an official United States Postal Service or Canadian equivalent postmark, the latter will be considered official. ASBO International does not verify receipt of applications by telephone. If candidates are required to mail materials to ASBO International, they are strongly encouraged to use express or certified mail with return receipt requested.

### PERSONAL INFORMATION CHANGES

The My SFO Manager online portal is the primary method used for communication regarding eligibility, exam confirmations, exam results, and recertification. Candidates and certificants have 24/7 access to exam-profile details and are responsible for ensuring their information is current.

### APPLICANT INELIGIBILITY

**An applicant may be determined ineligible for the following reasons:**

- Insufficient documentation to assess eligibility
- Lack of required experience
- Non-payment of application fee

If it is determined that the information provided is inadequate to assess eligibility, the applicant will be notified and provided a two-week deadline by which to respond with necessary documentation. If documents are not received by the given deadline and/or there is no follow-up action taken by the applicant, the application will be denied. No subsequent applications will be processed under the original fee.

### TEST ELIGIBILITY PERIOD

Candidates who are approved to test have one calendar year in which to sit for their examination without incurring additional fees. After one calendar year, individuals must reapply.

### REAPPLYING FOR ELIGIBILITY

Once candidates have exhausted their one-year application period, they can reapply for eligibility to test by submitting a new application, subject to the prevailing policies, complete with supporting documentation and required fees.

## EXTENSION

Candidates who are unable to test within their eligibility period due to adverse or unforeseen circumstances may submit a request for extension. Extension requests are reviewed on a case-by-case basis and if approved are subject to a \$60 fee.

## CANCELLATION AND REFUND

Application fees are non-refundable. Exams can be rescheduled with the test provider with no penalty, up to 48 hours before the scheduled exam time. Candidates who fail to appear for an examination forfeit all fees and must pay appropriate fees for subsequent examinations.

Under extreme circumstances (medical emergency or death of an immediate family member) late cancellations may be accepted. Extreme circumstances must immediately precede or coincide with the exam, and documentation must be provided in writing within seven days of the original examination date. Approvals will be made on a case-by-case basis.

## Audit

ASBO International may audit a portion of the applications that are submitted for compliance with the certification program requirements. It is the candidate's/certificant's responsibility to keep all documentation necessary to support program compliance. For further information about the audit process, view the [Certification Policies and Procedures Manual](#).

## Authority

ASBO International reserves the right to ask applicants to furnish additional information and to make inquiries as may be deemed appropriate to identify the nature and extent of the applicant's education, experience, competency, or moral character.

# Test Center Identification, Rules, and Conduct

## Test Admission

After a candidate has registered for an exam, he or she will be sent a confirmation email. The confirmation will contain the candidate's name and identification number, the address of the test center, the date of the test, and the name of the test. If a candidate loses the confirmation email or has not received it before the testing date, he or she should contact the test provider.

## Identification

Candidates are encouraged to report to the test center 30 minutes before their scheduled exam time. Two forms of ID are required. Candidates must present a valid government-issued photo ID with signature and a second form of ID with a signature (see information below on acceptable forms of ID). The name on the IDs must match the name on the exam confirmation email.

**Identification (ID) must:**

- Bear the candidate's name exactly as provided during the exam registration process (as it appears on the exam appointment confirmation letter).
- Have a permanently affixed photo of the candidate's face.
- Be current — expired IDs will not be accepted.
- Be an original document — no photocopies will be accepted.

**Acceptable forms of photo with signature identification are:**

- Government-issued driver's license.
- Passport.
- Military ID (except those with chips).
- Permanent resident visa.
- Other government-issued ID.

**Acceptable forms of signature identification include:**

- Any on the above photo ID list.
- Social Security cards.
- Credit/bank ATM card (signature required).

**Unacceptable forms of identification include:**

- Employee identification or work badge.
- University/college identification.

Candidates who do not have a valid photo ID or signature ID, or who arrive more than 15 minutes after the scheduled exam time, will NOT be permitted to enter the test center, and their examination fees will be forfeited.

Seating of candidates, distribution of test materials, and testing instructions will begin at the scheduled exam time. The total computer-based testing time is three hours. Included in these testing times is five minutes for review and agreement of the non-disclosure statement, five minutes for a tutorial, and five minutes for a follow-up survey. Candidates may leave the test center after they have completed the test. There are no scheduled breaks.

## Test Center Rules

The following are the rules enforced during all test administrations at all test centers:

- All candidates must have proper photo ID to be admitted to the test center.
- Candidates are admitted only to their assigned test center at their assigned time.
- Candidates arriving more than 15 minutes late will not be admitted, and will have to contact ASBO International before they will be able to reschedule the examination.
- No guests are permitted in the examination rooms.
- No reference material, books, papers, or personal items (purses, briefcases, coats, etc.) are allowed in the examination room.
- Other than the ASBO International-provided calculators (when applicable), no electronic devices are permitted in the assessment center, including telephones, signaling devices such as pagers and alarms, personal digital assistants (PDAs), and other hand-held computers.
- No weapons or instruments that may reasonably be used as weapons may be brought into the examination room.
- No test materials, documents, or memoranda of any sort are to be taken from the examination room.
- Candidates may not communicate with other candidates during the computer-based examination. Proctors are authorized to maintain secure and proper test administration procedures, including relocation of candidates.
- No questions concerning the content of the examination may be asked during the testing period.
- Candidates will be provided with scratch paper to use during the computer-based examination. The paper must be returned to the proctor at the completion of test or the candidate will not receive a score report.
- Food and beverages are not permitted in the assessment center. Tobacco products and gum may not be used during the examinations.
- Breaks are not scheduled during the exam. Candidates are permitted breaks on an individual basis, but no additional time is given to candidates who take breaks. Candidates who leave the testing room must receive permission from the proctor and may be escorted while outside the testing room.
- Candidates may not copy in writing or otherwise record or transmit to others any examination questions and/or answers or other aspects of the nature or content of the examination.
- Candidates may not offer to assist or solicit assistance from other candidates, examiners, or those responsible for the administration of the examination.
- Candidates may not engage in any other conduct or inappropriate behavior that is injurious to the integrity of the examination or to any of its participants.

## VIOLATING TEST CENTER RULES

If a candidate is caught violating testing rules, which are explained to all exam candidates, the candidate's scores may be invalidated and the candidate may be barred or permanently prohibited from participating in the certification program. Testing center proctors are authorized to take immediate, appropriate measures against candidates who are caught violating testing rules.

## MISCONDUCT AT THE EXAMINATION

It is improper for examination candidates to engage in any of the following activities:

- Fail to observe any rules of conduct as outlined by the proctor or site coordinator.
- Copy in writing or otherwise record or transmit to others any examination questions and/or answers or other aspects of the nature or content of the examination.
- Bring any unauthorized answering agent of any nature (e.g., books, notes) to the examination site.
- Offer to assist or solicit assistance from other candidates, examiners, or those responsible for the administration of the examination.
- Engage in any other conduct or inappropriate behavior that is injurious to the integrity of the examination or to any of its participants.

## DISMISSAL

Any candidate who is observed engaging in any misconduct will be subject to dismissal from the examination, may be barred from future examinations for a period ranging from one year to permanent dismissal, and may be required to forfeit his or her current examination fee and/or period of eligibility. Testing center proctors are authorized to take immediate, appropriate measures against candidates who are caught violating testing rules. The candidate is entitled to appeal the dismissal determination. The appeals process can be found in the [Certification Policies and Procedures Manual](#).

## VIOLATION OF CODE OF CONDUCT

If it is determined that a candidate has violated the Certification Code of Conduct, the candidate may be barred from taking the exam for a timeframe that is determined by the Certification Commission, if determined necessary or appropriate based upon the seriousness of the incident or violation.

## INCLEMENT WEATHER OR OTHER CIRCUMSTANCES PREVENTING TESTING

If for any reason the exam is unable to be administered or if any candidate is unable to arrive at a designated exam site because of inclement weather, terrorist acts, natural disasters, or other unforeseen emergencies beyond the control of the candidate as determined by ASBO International, the candidate may receive an extended testing window (to be determined on an individual basis) and will be allowed to reschedule the examination without being charged a re-examination fee. Candidates will be responsible for their own associated expenses for future testing.

## EXAMINATION IRREGULARITIES

Any problems, suspected instances of cheating, alleged inappropriate examination administration, environmental testing conditions severe enough to cause disruption of the process, or other irregularities related to test administration should be addressed to the onsite proctor. All such matters will be reported, investigated, and subject to further action based on policies and procedures adopted by the Certification Commission.

Cheating or other violations of the Certification Code of Conduct or matters that may constitute grounds for disciplinary action will be handled under the disciplinary procedures adopted by the Certification Commission, but other issues in the nature of examination irregularities are not subject to appeal.

## HANDLING OF TESTS

ASBO International will take all available precautions to ensure the appropriate and secure handling of completed test data. In the rare and extreme case in which the test data become lost or unreadable, candidates will be required to undergo retesting without being charged a re-examination fee. Candidates will be responsible for their own travel-associated expenses for future testing.

# Exam Results Notification, Retesting, and Appeals

## Notification of Test Results

Candidates taking the computer-based test are notified immediately of their examination results with an unofficial score report. Official score results will be emailed to candidates after the examination results have been audited.

Candidates taking the paper and pencil exam will be notified of their official examination results approximately four weeks after their exam. ASBO International reserves the right to revoke examination results during this time. For security reasons, results will not be given over the phone or sent by fax.

## RESULTS – PASSING

Candidates who successfully complete the examination and whose credentials and application entitle them to certification will be notified by email and granted a Certified Administrator of School Finance and Operations (SFO) certification.

The certification remains the property of ASBO International, which may withdraw, cancel, revoke, or otherwise annul the certification for cause.



## RESULTS – FAILING

Candidates who do not successfully complete the examination will be able to access their official score report online via the My SFO Manager portal.

This report will indicate the candidate's overall pass/fail status. Failing candidates will also receive a scaled score. The scaled score indicates how close the candidate came to passing the examination. The minimum scaled score required to pass is 600.

The score report will also include an indication of the candidate's relative strengths and weaknesses by examination topic or domain. The percentage of the test addressing each domain is indicated in the exam content outline presented earlier in this Handbook.

Candidates pass or fail the test as a whole. There are no pass/fail scores calculated by domain. The score report feedback about the candidate's performance by domain is provided solely for the purposes of preparing for the next exam.

## RETESTING: CANDIDATE FAILS

A candidate may take the examination only two times during a one-year period. Candidates who reapply must submit a new application, pay all applicable fees, and fulfill all requirements stipulated by the Certification Commission for that year.

## RETESTING: CANDIDATE PASSES

A candidate who passes any SFO certification test is prohibited from retaking the same certification test.

## APPEALS POLICY

Candidates may appeal the results of eligibility determination or the examinations within 30 days of the date of the results. The appeals process can be found in the [Certification Policies and Procedures Manual](#).

## Request for Duplicate Certificate

Any certificant may request additional copies of his or her certification document. Requests must be made in writing to ASBO International and may be made at any time. The fee of \$25 must be included with the request. The request for a duplicate certificate can be made via the My SFO Manager online portal.

# Recertification and Lapsed Designation

## Purpose of Recertification

Active SFOs demonstrate their commitment to stay abreast of industry best practices by ensuring their knowledge and expertise remain current via recertification. It is these stringent requirements that make the SFO program highly sought after and respected by school business management professionals, their employers, and the constituents they serve.

[View the complete renewal and recertification guide.](#)

## Recertification Process

Certificants must recertify every three years to maintain an active SFO status. Recertification requires:

- Continued agreement and compliance with the ASBO International Certification Code of Conduct.
- Submission of 45 contact hours of professional development.
- Payment of \$300 recertification fees.

There is a 45-day grace period for late submissions and reinstatement, which are subject to a \$60 late fee.

## CONTACT HOURS

ASBO International uses contact hours to define a unit of continuing education where 1 contact hour equals 50 minutes of educational content. Certificants must ensure that at least 30 of the 45 required contact hours are in a structured learning environment.

**Note:** *As part of the 30 unstructured contact hours, a candidate can count one year of experience on the job as 3 contact hours. Contact hours are entered online via the [My SFO Manager](#) online portal.*

## GUIDE FOR STRUCTURED AND UNSTRUCTURED LEARNING

### Structured Learning Environment

Structured contact hours may include traditional instructor-led classrooms or e-learning formats that contribute to the certificant's knowledge and understanding of the profession: university/college courses (one credit = 15 contact hours), workshops and seminars, conferences, and online courses.

### Unstructured Learning Environment

Unstructured contact hours can be obtained through self-directed activities that contribute to the certificant's knowledge and understanding of the profession. Activities may fall into two categories:

1. **Research and publishing:** For each year or single activity, certificants can earn three contact hours (e.g., one article published = three contact hours).

2. **Instruction, leadership, and service:** For instruction activities, certificants earn three contact hours for prep and one contact hour for each 50 minutes of content delivered. These activities should be conducted on a part-time basis and not be considered the certificant's full-time job. Experience on the job may be included in this category with one year equaling three contact hours.

See **Recertification Guide** for more detailed information about contact hours activities and assessment.

## **FILING A RECERTIFICATION EXTENSION REQUEST**

Keeping your credential active requires annual renewal. An SFO may apply to ASBO International for a filing extension due to the following conditions:

1. Unemployment
2. Appointment or election to full-time public office on the local, state, or national level or service in the military

The request for the filing extension must be submitted in writing to ASBO International within three months of their post-recertification date. Extensions are not granted for more than one year and are subject to the review of the Certification Commission. There may be an extension fee of \$60 applied to each request.

## **NOTICE OF RECERTIFICATION AND REMINDERS**

Approximately six months prior to the expiration of the certificant's certification, ASBO International will send certificants a notice and information about their current recertification application. This notice will be sent to the certificant's last address on file with ASBO International's online via My SFO Manager.

It is the professional responsibility of each certificant to notify ASBO International of a change of address, to be aware of his or her certification expiration date, and to complete the application by the specified deadlines. Failure to receive notice from ASBO International does not excuse the certificant from complying with all recertification deadlines.

## **LOSS AND REINSTATEMENT OF CERTIFICATION**

Individuals who do not meet recertification requirements will lose certified status. To reinstate certified status, individuals must re-establish eligibility and pass the certification examination.

# Certification Mark Usage Policies and Procedures

## Appropriate Use of the Certification

An individual who has been granted the Certified Administrator of School Finance and Operations (SFO) certification may list the certification on stationery, websites, business cards, and other promotional materials as:

- First name, Last name, Certified Administrator of School Finance and Operations
- First name, Last name, SFO

Should the certification be suspended or withdrawn for any reason, the individual must immediately cease the use of the title “Certified Administrator of School Finance and Operations” and acronym designation on stationery, websites, business cards, and any and all promotional materials.

## ASBO International Certification Code of Conduct

The Association of School Business Officials International (ASBO) is a professional organization that supports and promotes school business management practitioner certification.

The Certification Code of Conduct enables ASBO International to define and clarify the professional responsibilities for present and future ASBO International certificants, i.e., Certified Administrator of School Finance and Operations (SFO).

It is vital that ASBO International certificants conduct their work in an appropriate and professional manner to earn and maintain the confidence and respect of colleagues, employers, students, and the public, and that they also work to promote the highest standards of the profession, conducting business honestly, openly, and with integrity.

To be qualified for ASBO International SFO certification, individuals shall act in a professional manner and in accordance with the ASBO International Certification Code of Conduct as follows.

Applicants for ASBO International SFO certification and ASBO International SFO certification holders must

- Not participate in negligent, harmful, and/or intentional misconduct in their professional work;
- Report to ASBO International in writing of any conviction of a crime, except misdemeanor traffic offenses or traffic ordinance violations unless such offense involves the use of alcohol or drugs, or of any professional suspension within 10 calendar days after the date on which the certificant is notified of the conviction or suspension;
- Comply with all local, state/provincial, and federal laws, regulations, and statutes governing the practice of school business management;
- Neither accept nor offer nor make any substantial compensation or gifts with the intent of influencing the judgment of any individual or business entity in connection with the work of the certificant or the certificant’s employer, nor accept any substantial compensation from a supplier of materials or services in exchange for recommending or promoting the supplier;

- Not engage in conduct involving fraud or the wanton disregard of the rights of others and shall not have been convicted of a crime, the circumstances of which substantially relate to the practice of school business management or indicate an inability to engage in the practice of school business management safely and/or competently, including but not limited to crimes against children, sexual abuse, civil rights violations, embezzlement, theft, etc.;
- Not obtain or attempt to obtain certification by misrepresentation, bribery, fraud, or deception;
- Not make misrepresentations regarding ASBO International SFO certification or renewal of ASBO International SFO certification; and
- Not engage in cheating or other dishonest behavior that violates exam security, including memorization, reproduction or distribution of secure test content, and tampering with the contents of the exam.

In addition, no person shall be permitted to maintain ASBO International SFO certification if, in the judgment of ASBO International's Certification Commission, the person's professional competence is substantially impaired by physical or mental disabilities such as drug or alcohol addiction, accidents affecting the brain, or mental health issues.

# Forms

All forms submitted are confidential.

## Test Modification Request Form

Candidates with disabilities covered by the Americans with Disabilities Act, the Canadian Federal Disabilities Act, or the Canadian Charter of Human Rights must complete this form and have an appropriate licensed professional complete the Documentation of Disability-Related Needs form in order for their accommodations request to be processed.

### Applicant Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Special Testing Modifications

Exam Date and Location (test center) for which you are requesting accommodation:

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

I would like to request the following testing modification(s):

Extended testing time (time and a half)

Large-print test. Point size: \_\_\_\_\_

Reader

Separate testing area

Special seating (please describe): \_\_\_\_\_

Wheelchair-accessible testing site

Other special accommodations (please specify): \_\_\_\_\_

\_\_\_\_\_

APPLICANT SIGNATURE

## Documentation of Disability-Related Needs by Qualified Provider

This form must be completed by a licensed healthcare provider or an educational/testing professional. The nature of the disability, identification of the test(s) used to confirm the diagnosis, a description of past accommodations made for the disability, and the specific testing modifications requested must be included.

### Professional Documentation

I have known \_\_\_\_\_ since \_\_\_\_\_ in my capacity as a(n)  
NAME OF APPLICANT DATE

\_\_\_\_\_  
PROFESSIONAL TITLE BOARD CERTIFICATION

The applicant discussed with me the nature of the test being administered. It is my opinion that because of this applicant's disability described below, he/she should be accommodated by providing the special arrangements listed on the Test Modification Request Form.

### Comments on Disability

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

License # (if applicable): \_\_\_\_\_

Phone Number: \_\_\_\_\_

Date: \_\_\_\_\_

### Candidate Instructions

Return this form with a copy of the Test Modification Request Form to:

Certification Department  
ASBO International  
44790 Maynard Square, Suite 200  
Ashburn, VA 20147

Written modification requests may also be scanned and submitted via email to: [certification@asbointl.org](mailto:certification@asbointl.org) with the words: *Test Modification Request* in the subject line of the email or online through the My SFO Manager online portal.

**FOR USE BY ASBO INTERNATIONAL**

\_\_\_\_\_  
APPROVAL SIGNATURE

\_\_\_\_\_  
DATE

## Recertification Extension Request Form

Submission Date: \_\_\_\_\_

Name: \_\_\_\_\_

Contact (If different from My SFO Manager): \_\_\_\_\_

**Please state reason for request:**

*(Supporting documentation may be provided if needed)*

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The request for filing an extension must be submitted in writing to ASBO International within 3 months of the post-recertification date. The Commission requires a minimum of 6 weeks to review supporting documentation and provide a response.

**Return this form to:**

Certification Department  
ASBO International  
44790 Maynard Square, Suite 200  
Ashburn, VA 20147

Requests may also be scanned and submitted via email to: [certification@asbointl.org](mailto:certification@asbointl.org) with the words: ***Test Extension Request*** in the subject line of the email.

**FOR USE BY ASBO INTERNATIONAL**

\_\_\_\_\_  
APPROVAL SIGNATURE

\_\_\_\_\_  
DATE



# Candidate Agreement

All candidates must sign the Candidate User Agreement and agree to all policies, procedures, and terms and conditions of certification in order to be eligible for the respective credential. The statement follows.

I certify that, to the best of my knowledge, the information on this certification application is true, complete, and accurate. I authorize ASBO International to verify the accuracy of any information contained in, or supplied in support of the application from any person(s) having knowledge of such information.

I understand that violation of the ASBO International Certification Code of Conduct may be grounds for disciplinary action and possible denial or revocation of certification. I recognize that admission to take the certification examination, once granted, may be revoked at any time if it is established that information provided for certification or for recertification is not accurate and/or complete; if I engage in illegal or inappropriate conduct during the exam or once certification is conferred; or if I violate the ASBO International Certification Code of Conduct.

By my signature, I attest that I will maintain my certification as required and uphold the ASBO International Certification Code of Conduct.

When creating an account in ASBO International's My SFO® Manager online portal, all candidates must read and agree to the following terms online:

I hereby release, discharge, and exonerate ASBO International, its directors, officers, certification commission, members, examiners, representatives, and agents, from any actions, suits, obligations, damages, claims or demands arising out of, or in connection with, any aspect of the application process including results or any other decision that may result in a decision to not issue me a certificate.

The Association of School Business Officials International ("ASBO") does not make any representations or warranties with respect to this website, its contents, or the documents, classes, programs, exams and other materials provided hereunder (collectively, the "Materials"). The Materials are provided on an "AS IS" and on an "AS AVAILABLE" basis. ASBO HEREBY DISCLAIMS ALL WARRANTIES OF ANY NATURE, EXPRESS, IMPLIED, OR OTHERWISE, OR ARISING FROM TRADE OR CUSTOM, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, NONINFRINGEMENT, QUALITY, TITLE, FITNESS FOR A PARTICULAR PURPOSE, COMPLETENESS OR ACCURACY.

TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAWS, ASBO SHALL NOT BE LIABLE FOR ANY LOSSES, EXPENSES, OR DAMAGES OF ANY NATURE, INCLUDING, WITHOUT LIMITATION, SPECIAL, INCIDENTAL, PUNITIVE, DIRECT, INDIRECT OR CONSEQUENTIAL DAMAGES OR LOSS OF USE, LOST OR DAMAGED DATA OR LOST INCOME OR PROFITS, RESULTING FROM OR ARISING OUT OF APPLICANT'S USE OF THE MATERIALS, WHETHER ARISING IN TORT, CONTRACT, STATUTE, OR OTHERWISE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Applicant makes the following representations, warranties, and covenants:

- A. The information included in this application by Applicant is true and correct and is not false or misleading in any respect;
- B. Applicant will abide by all rules, regulations, procedures

and policies of the Certified Administrator of School Finance and Operations (SFO®) certification program (the "Program"), as amended from time to time, including, without limitation, the Program rules, regulations, procedures, and policies set forth at [asbointl.org](http://asbointl.org); and

- C. Applicant will not engage in unethical behavior or seek an unfair advantage in connection with any certification examination, or assist others in doing so, such as by copying answers from another candidate, providing assistance to another candidate, or using unauthorized materials during the exam, and should Applicant become aware of such conduct by others, Applicant will report it to ASBO.

Applicant understands that failure to abide by these representations, warranties, and covenants will result in disciplinary action, including, but not limited to, expulsion from the Program, cancellation of exam scores, revocation of certified status, and/or disqualification from future examinations and programs.

Applicant hereby forever releases from liability, and waives any claim against, ASBO, its directors, certification commission, employees, instructors, and committee members for all acts or omissions, including, without limitation, with respect to disciplinary actions, which may adversely affect me in any way whatsoever, including but not limited to, loss of employment or promotion, inability to obtain a position which requires Program certification, and dismissal from any position.

The Materials (including, without limitation, the exam and course materials) in their entirety are ASBO's confidential material and are protected by copyright and trade secret law. The Materials are made available to Applicant solely for the purpose of becoming educated and certified in the technical area of the Program. Applicant acknowledges and agrees that Applicant is expressly prohibited from disclosing, publishing, reproducing, or transmitting any Materials (including, without limitation, the exam and course materials), in whole or in part, in any form or by any means, verbal or written, electronic or mechanical, for any purpose, without the prior express written permission of ASBO. Any breach of this agreement will result in Applicant's disqualification from the Program and may subject Applicant to civil and/or criminal penalties.

Applicant hereby indemnifies, defends, and holds ASBO, its successors and assigns, and its directors, committee members, officers, employees, members, representatives, and agents, harmless from and against any and all loss, liability, damage, claim, suit, demand and expense, including, but not limited to, taxes, fines, penalties, court costs and attorney's fees, arising in connection with or related to any act or omission (including, without limitation, any breach of this agreement) of Applicant.

Applicant acknowledges and agrees that Applicant will not be entitled to use or display any Program names, designations, marks or logos unless and until Applicant has successfully completed the Program (including, without limitation, passed the exam) and has executed the Program license agreement provided by ASBO.

Sign below to accept these terms.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

PROUD SPONSOR



ASBO International's certification program is governed by the Certification Commission, a semi-independent certifying body of the Association of School Business Officials International.

*In adherence to the best practices for certifying bodies, Certification Commission volunteers and certification staff are not involved in the development of any preparatory program, and no preparatory program is endorsed by the Certification Commission nor is a prerequisite to earn the certification.* The Certification Commission and its staff are solely responsible for the policies and administration of the certification program, including application procedures and qualification requirements.