

Job Task Analysis Results

ASBO International Certification Program

Full Report

A certification for school business officials.
March 3, 2010



**Association of School Business
Officials International**

Full Report: **ASBO International's Job Task Analysis Results**

The Association of School Business Officials International (ASBO) is developing a certification program for school business officials. The first step in creating the program was to identify the tasks performed by school business officials and the knowledge and skills needed to perform those tasks. ASBO conducted a job task analysis to identify these areas of competency.

The job task analysis began with a three-day face-to-face meeting of 12 practicing school business officials, October 2–4, 2009, in Orlando, Florida. They created an outline of the duty areas, tasks, skills, and knowledge required to perform those tasks. Based on the results of that meeting, an online survey was created to validate the results of the job analysis study and finalize a certification examination blueprint.

The 1,639 survey participants were located in 50 states across the United States and five Canadian Provinces, the majority of which are working in a public K–12 school, and with varying years of experience in the field. The majority of survey respondents have a college education and are responsible for school finances and business operations.

Introduction

A job analysis is a process or procedure for analyzing the tasks performed by individuals in an occupation, as well as the knowledge, skills, and abilities required to perform those tasks. Specifically, job analysis can be defined as “any systematic procedure for collecting and analyzing job-related information to meet a particular purpose” (Raymond 2001, p. 372). Job analysis can be used for multiple purposes including, but not limited to, job description, job classification, job evaluation, performance appraisal, training, worker mobility, workforce planning, efficiency, safety, and legal and quasi-legal requirements (Brannick, Levine, & Morgeson 2007). Job analysis is traditionally used by secondary and post-secondary educators, business or industry trainers, government or military trainers, and test developers. There are multiple methods for conducting job or task analyses, and for the purpose of this credential, the DACUM method of job analysis was used.

Association of School Business Officials International

ASBO International is a professional association that provides programs and services to promote the highest standards of school business management practices, professional growth, and the effective use of educational resources. Founded in 1910, ASBO International has nearly 6,000 school business management professionals as members. With an average budget oversight of \$141 million annually, ASBO International members are the finance decision makers in school districts around the world.

ASBO International members are employed in K–12 school districts, community colleges, universities, and state departments of education. They manage the business side of school district operations, including the areas of budgeting, purchasing, and financial management; facility operations and maintenance; human resources; technology; transportation and security; food service; health care; and much more.

To promote its mission, ASBO International has developed nearly 200 professional standards and a 28-point ethical code that encompasses standards, conduct, and expectations for school business officials. By following these standards and the ethical code, professionals practice at the highest levels of quality and ethics.

Process Development

In 2009, ASBO International determined that the development of a professional certification credential for school business officials would provide a way for professionals to earn international credentials based on competency, and raise the public's awareness of the profession. The program will encompass both the United States and Canada.

ASBO International requested proposals for services to develop and implement a job analysis and to develop a certification examination program. Because ASBO International did not have an existing certification program, the job analysis was the first step.

Professional Testing, Inc. was the successful bidder to conduct the job analysis study and subsequent validation study. The principals assigned to this project were Clarence "Buck" Chaffee, Cynthia Woodley, Ph.D. and Christine Niero, Ph.D. These individuals are experienced senior practitioners with top-level experience in test design and development, business management, research, and planning. In addition, Professional Testing brought to the project as needed, individuals from the staffs of Professional Testing and a partner, The Caviart Group, to complete the work-- in total almost 40 credentialing and testing professionals. For updated resumes of each of these partner professionals, visit www.proftesting.com and www.thecaviartgroup.com.

Methods

Job Analysis Process Overview

A job analysis is a foundational requirement of any professional certification program and helps to identify the core knowledge areas, critical work functions, and skills that are common across a representative sampling of current practitioners and incumbent workers. Empirical results from the job analysis provide examinees and the public the basis of a valid, reliable, fair, and realistic assessment that reflects the skills, knowledge, and abilities required for competent job performance.

Professional Testing, Inc., utilized the knowledge and expertise of school business practitioners to prepare a comprehensive list of activities associated with the job duties performed by a school business officials. These expert practitioners, serving as a focus group, participated in a DACUM process to generate the list of job duties and tasks. (DACUM stands for **D**eveloping **A** **C**urricul**U**M and is an occupational analysis performed by an expert panel from a particular occupation and facilitated by a trained DACUM facilitator.)

The focus group meeting took place in Orlando, Florida, October 2-4, 2009. After the two and one-half day focus group meeting, Professional Testing, Inc. developed an online survey of practitioners to further validate the results of the focus group meeting. The survey results were also used to validate the weighting of the resulting examination blueprint.

Focus Group Meeting

The first day of the focus group meeting began with an introduction to the DACUM process and an explanation of the job analysis process and why it was being utilized in this case. The panel also was provided with the definition of a duty and a task statement. The facilitators then illustrated the difference between the two. The panel then practiced creating duty and task statements.

The meeting then shifted to a discussion of panel members' own job titles--more specifically, the who, how, what, and why of their jobs. This information was compiled into a comprehensive list and posted on the wall for future reference. The participants identified duty areas specific to their jobs and the facilitators recorded the duty areas on large index cards and posted them on the wall. After participants identified the duty areas, they identified the tasks associated with each. These tasks were sequentially ordered and entered onto an Excel spreadsheet.

At the end of day one, the facilitators reviewed with the panelists what they had identified as their job titles and formulated a job description, which they shared with the panel on day two of the job analysis.

On the second day, the facilitators shared the Excel spreadsheet with the duty areas and corresponding task statements and asked the participants to list the steps involved in each task statement. Along with stepping out each task, the participants also were asked to identify the knowledge, skills, attributes, and tools and equipment needed for each task statement. This part of the job analysis process occupied most of the second day and carried into the final day.

Job Task Analysis Panel

The Job Task Analysis Panel consisted of 12 practicing school business officials who represented the breadth, scope, and diversity of practicing schools business officials from across the United States and Canada.

To find such a diverse group, ASBO International reached out to its state and provincial affiliate organizations and the National Business Officers Association, whose mission is to serve school business officials in private schools. Characteristics considered in the selection process included gender, race/ethnicity, age, education, years in job, job title, career path, funding source, density, geographic location, and school/district level of education taught. Panel members were not required to be members of ASBO International.

The panel member demographics included practitioners with various titles, including Business Manager, Director of Business Operations, and Assistant Superintendent. The panel had two members with fewer than 2 years on the job, six members with 2–10 years, and three members with more than 10 years on the job. The types of schools that were represented on the panel included public K–12, public K–6, private K–12, charter, vocational-technical, and community colleges. Members of the panel came from rural, suburban, and urban communities.

These characteristics provide a breadth and scope of the responsibilities school business officials have in the job. The responsibility areas in the certification that are represented by these characteristics include educational enterprise, financial resource management, human resource management, facility management, property and acquisition management, information management, and ancillary services (risk management, transportation, and food service). These are the areas of professional practice in ASBO International's professional standards.

The following school business officials participated in the job task analysis.

Brian Adesso, Business Manager, School District of Manawa, Manawa, WI

Lyle Boyce, Secretary Treasurer, School District No. 72, Campbell River, BC

Patrick Collins, Director of Business Operations, Assabet Valley Regional Technical High School, Marlborough, MA

Philip Cork, Associate Headmaster for Finance and Administration, Saint Andrew's School, Boca Raton, FL

Laura Cowburn, RSBS, Assistant to the Superintendent Business Services/Board Secretary, Columbia Borough School District, Columbia, PA

Mohsin Dada, CFP, RSBA, Assistant Superintendent for Business Services, Schaumburg Community School District No. 54, Schaumburg, IL

Galen Howsare, RSBA, Vice President of Administration and Finance, Hawkeye Community College, Cedar Falls, IA

Susan Legutko, RSBO, Director of Finance, Duval County Public Schools, Jacksonville, FL

Jenny Martens, Business Manager, Nome Public Schools, Nome, AK

Anita Stugelmeyer, RSBS, Business Manager, Lemmon School District 52-4, Lemmon, SD

Wes Rogers, RSBO, Business Manager, Oregon City School District 62, Oregon City, OR

Cheryl Washington, Ph.D., CEO/Superintendent, Shekinah Learning Institute, Converse, TX

Pam Weber, CAE, Director of Certification, ASBO International, Reston, VA (Staff liaison)

Survey Validation Study Overview

Upon completion of the focus group meeting, Professional Testing, Inc., developed a survey to validate the tasks and knowledge, skills, and attitudes identified during the focus group meeting. Professional Testing, Inc., involved ASBO International throughout the development of the survey to ensure that subject content expertise was available. Before the survey was disseminated, the focus group panel and ASBO International staff reviewed the draft, identified survey participants, and sent survey notices to potential respondents.

Development of Demographic Questions for the Online Validation Survey

The first step in developing the online validation survey was to develop key demographic questions—both open-ended and multiple choice--to ensure the representativeness of survey respondents and help avoid threats to the validity of survey responses.

The demographic questions were:

1. In which state or province do you work?
2. What is your highest level of education?
3. If you have a college degree, what was your area of specialization?
4. What describes your primary job function?
5. What is your job title?
6. How many years have you been in the profession?
7. How many years have you been at your current position?
8. What is your student enrollment?
9. What is the size of your total revenues?
10. What is the type of school in which you work?
11. Which area were you in prior to school business?
12. At what point in your career did you feel comfortable with your role as a school business official?

Development of Task Rating Scales for the Online Validation Survey

The second step in developing the online validation survey was to identify the rating scales with which survey participants would rate the tasks performed by a school business official. There are multiple models of rating scales used in job analyses; however, for the purposes of this study, three survey scales were used: task frequency, task importance, and need at entry.

Task frequency was chosen because those tasks that are performed more often should have a higher emphasis placed on them (Newman et al., 1999). Task importance was chosen because it is the most common scale used when evaluating tasks for licensure and certification job analysis (Newman et al., 1999) and as illustrated in the *Standards for Educational and Psychological Testing*, “the content domain to be covered by a credentialing test should be defined clearly and justified in terms of the importance of the content for credential-worthy performance in an occupation or profession” (AERA, APA, NCME, 1999, p. 161). Finally, need at entry was chosen because many of the tasks performed by school business officials may be tasks learned after years on the job and therefore would not be appropriate tasks to measure knowledge of during a credentialing examination. It was important to identify the tasks candidates should have knowledge of when entering the credentialing profession.

The three rating scales are illustrated below:

<u>Frequency</u>	<u>Importance</u>	<u>Need at Entry</u>
Daily – 4	Very Important – 3	Required at Entry – 1
Weekly – 3	Important – 2	Within the First 6 Months – 0
Monthly – 2	Somewhat Important – 1	Within the First Year – 0
Yearly – 1	Not Important – 0	After the First Year – 0
Never – 0		

Only two of the three survey scales were combined to create an overall task rating, as illustrated below:

$$2 * \text{Importance} + \text{Frequency} = \text{Overall Task}$$

Professional Testing took the calculated “overall task score” and used it to determine the exam blueprint.

Administration of the Online Validation Survey

Professional Testing, Inc. used an internet survey software system to develop the survey. A link to the online survey was emailed to 23,600 members of the ASBO International, National Business Officers Association, and ASBO affiliate organizations in November 2009. The survey was also posted on ASBO International’s public website, www.asbointl.org.

Overall, there were 1,639 responses, representing a 7% response rate. While not a significantly high response rate, it was determined to be sufficient for the purpose of validating the job analysis study.

Survey Validation Study Results

Representativeness of Online Validation Survey

The background and demographic portions of the survey help determine how representative the survey respondents are of the population of interest.

Figure 1: States and provinces in which respondents reported working

The 1,639 survey participants were located across all 50 U.S. states, as well as five Canadian provinces, as illustrated in Figure 1. The largest number of respondents were from Iowa (209 or 12.94%), followed by Wisconsin (173 or 10.71%). Eleven survey respondents reported working in other locations: three in Australia, three in Washington, DC, one in El Salvador, one in the Northwest Territories of Canada, one in the United Kingdom, and two who reported working internationally.

State or Province	Number of Respondents	Percent of Total Respondents
Alabama	7	0.43%
Alaska	27	1.67%
Alberta	30	1.86%
Arizona	15	0.93%
Arkansas	29	1.80%
British Columbia	5	0.31%
California	17	1.05%
Colorado	15	0.93%
Connecticut	45	2.79%
Delaware	3	0.19%
Florida	13	0.80%
Georgia	8	0.50%
Hawaii	2	0.12%
Idaho	19	1.18%
Illinois	87	5.39%
Indiana	7	0.43%

State or Province	Number of Respondents	Percent of Total Respondents
Iowa	202	12.94%
Kansas	9	0.56%
Kentucky	4	0.25%
Louisiana	3	0.19%
Maine	4	0.25%
Manitoba	4	0.25%
Maryland	14	0.87%
Massachusetts	105	6.50%
Michigan	82	5.08%
Minnesota	30	1.86%
Mississippi	5	0.31%
Missouri	26	1.61%
Montana	11	0.68%
Nebraska	9	0.56%
Nevada	1	0.06%
New Hampshire	25	1.55%
New Jersey	55	3.41%
New Mexico	18	1.11%
New York	47	2.91%
North Carolina	16	0.99%
North Dakota	1	0.06%
Ohio	41	2.54%
Oklahoma	58	3.59%
Ontario	3	0.19%
Oregon	22	1.36%
Pennsylvania	70	4.33%
Rhode Island	3	0.19%
Saskatchewan	4	0.25%
South Carolina	4	0.25%
South Dakota	36	2.23%
Tennessee	5	0.31%
Texas	52	3.22%
Utah	4	0.25%
Vermont	4	0.25%
Virginia	17	1.05%
Washington	102	6.32%
West Virginia	2	0.12%
Wisconsin	173	10.71%
Wyoming	7	0.43%
Multiple States	1	0.06%

Figure 2: Survey participants reported highest level of education

Survey participants were asked to report their highest level of education. The greatest number of survey participants reported a master’s degree (643 or 39.30%), followed closely by a bachelor’s degree (577 or 35.27%), as illustrated in Figure 2.

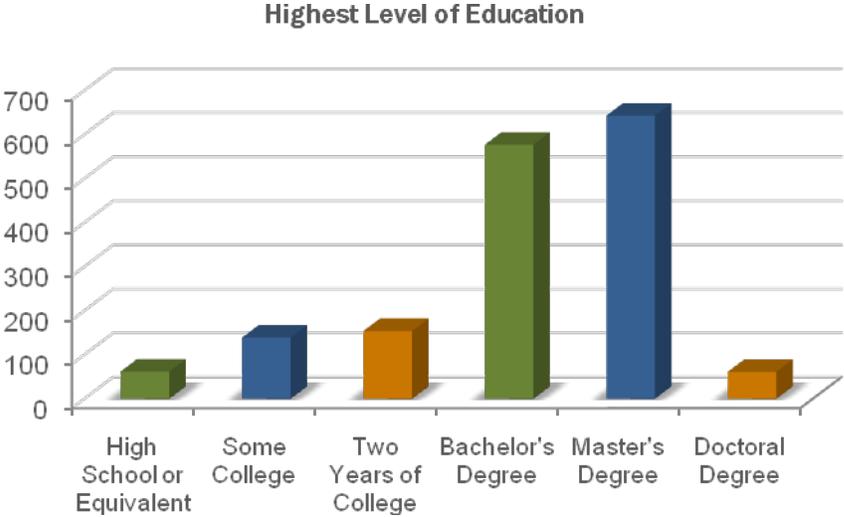


Figure 3: Area of specialization reported by survey respondents

The survey participants who reported having a college degree were asked to report their area of specialization. The largest number reported specializing in Accounting (552 or 44.99%), as illustrated in Figure 3.

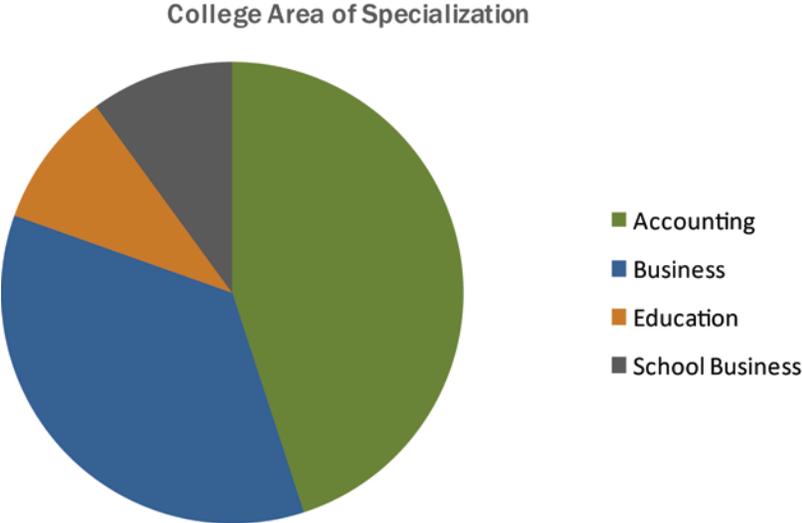


Figure 4: Participant’s primary job function

Survey respondents were asked to report their primary job function. The majority of respondents reported being responsible for school finances and business operations as their primary job functions, as illustrated in Figure 4.

Job Function	Frequency	Percent
Responsible for a specialty area of school business	157	9.73%
Responsible for school finances and business operations	1282	79.48%
Support for the school finance and business operations	174	10.79%

Figure 5: Number of years in the profession

Survey participants were asked to report the number of years they have been working in the profession and the number of years they have been at their current position. The greatest number of respondents reported working in the field for more than 15 years (774 or 47.90%), while the smallest number of respondents reported working in the field for fewer than one year (19 or 1.18%), as illustrated in Figure 5.

Number of Years	Frequency	Percent
Less than 1 year	19	1.18%
1 to 5 years	258	15.97%
6 to 10 years	301	18.63%
11 to 15 years	264	16.34%
More than 15 years	774	47.90%

Figure 6: Number of years spent working at participants’ current position

Although almost half of all survey respondents reported working in the profession for more than 15 years, the number of years spent at their current position varied, with the largest number working at their current position for only 1 to 3 years (417 or 25.55%), as illustrated in Figure 6.

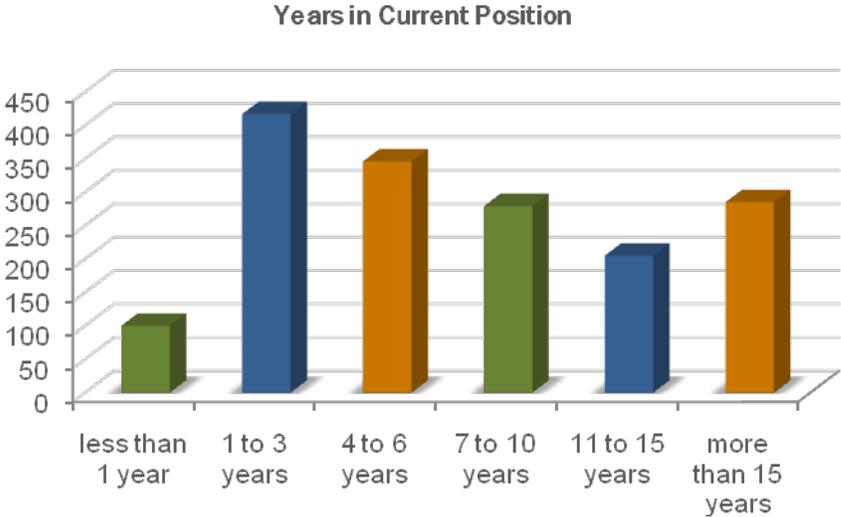


Figure 7: Current student enrollment

Survey participants were asked to report their student enrollment and total revenues. The largest number of respondents reported enrolling fewer than 2,000 students (724 or 45.56%), as illustrated in Figure 7.

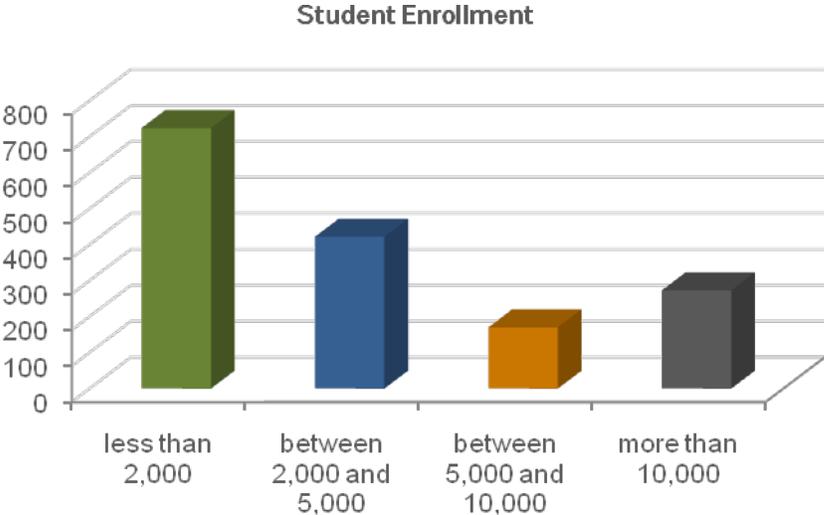


Figure 8: Size of total school revenues

The largest number of survey participants reported having more than \$50 million in total revenues (463 or 29.34%), followed by between \$20 million and \$50 million (411 or 26.05%), as illustrated in Figure 8.

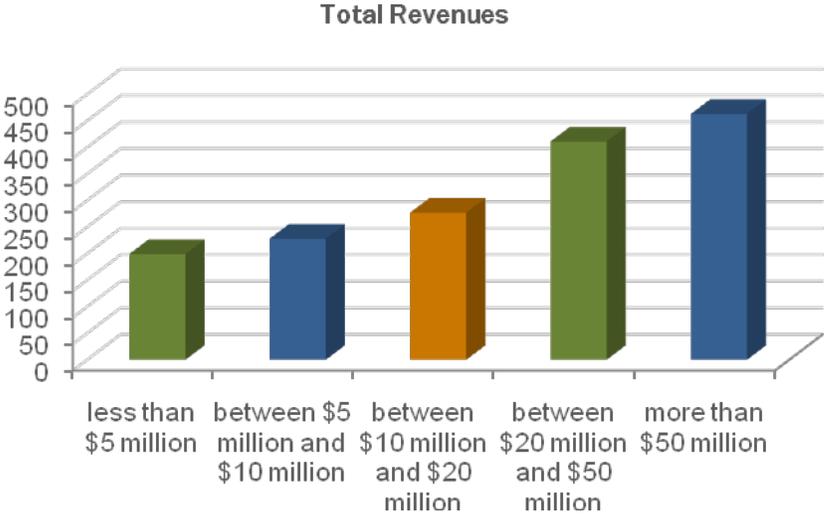


Figure 9: Type of school in which participants worked

Survey participants were asked to report the type of school in which they worked. The majority of survey respondents (92.4%) reported working in a public K–12 school, with the fewest number reporting working at a community college (0.27%), as illustrated in Figure 9.

School Type	Frequency	Percent
Charter School	25	1.68%
Community College	4	0.27%
Private K-12	45	3.03%
Public K-12	1374	92.40%
Technical School	39	2.62%

Figure 10: Area in which survey participants previously worked

Survey respondents were asked to report the area in which they worked prior to their entry into school business. The majority of respondents reported working in business (53.45%); the fewest number reported working in the military (1.54%), as illustrated in Figure 10.

Prior Area	Frequency	Percent
Attending college	105	7.71%
Business (CPA, banking, etc)	728	53.45%
Education (teacher, principal, etc)	171	12.56%
Government	190	13.95%
Military	21	1.54%
Nonprofit	67	4.92%
Out of workforce for more than 1 year	44	3.23%
Technology	36	2.64%

Figure 11: The point in which survey participants felt comfortable with their role

Survey participants were asked to report at which point in their career they felt comfortable with their role as a school business official. The largest number of respondents reported feeling comfortable between two and five years (632 or 38.92%), followed closely by between six months and two years (511 or 31.47%), as illustrated in Figure 11.



Upon final analysis of the survey instrument, it was determined that for all tasks and all rating scales, the standard error of the mean was less than 0.10, indicating that if the survey were to be repeated with a different sample of survey respondents, the results would be the same.

Exam Content Outline and Specifications

Results of the focus group and the online survey helped inform the content of ASBO International’s certification examination. The examination will consist of a two-part examination, along with eligibility criteria that will include level of education and years of experience. The ASBO International Certification Commission, a commission of the ASBO Board of Directors appointed to oversee development and implementation of the certification program, approved the exam blueprint in January 2010 and will create the eligibility criteria and program details in the spring of 2010. The exam content outline (presented below) demonstrates the responsibility areas and their respective subtasks for school business officials that will be included on the certification examination.

Part 1 of the examination focuses on information that is necessary at the time of job entry; part 2 focuses on competencies needed after the professional has some experience in the job.

Content Areas and Tasks Part 1 (percentage of test) 60 items in total

Manage Accounting Systems (28% to 33%)

Maintain Accounting Software

Maintain Chart of Accounts
Reconcile General Ledger Accounts
Track Fixed Assets

Manage Accounting Functions (67% to 72%)

Manage Payroll Functions
Manage Accounts Receivable
Manage Accounts Payable Process
Manage Purchasing Procedures
Manage Annual Budgets
Prepare Financial Reports
Manage Cash Flow

Content Areas and Tasks Part 2 (percentage of test) 90 items in total

Conduct Financial Planning and Analysis (27% to 32%)

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 Data
Analyze Demographic Data
Develop Multi-Year Forecast
Estimate Real Estate Property Tax Revenues

Conduct Budgeting and Reporting Activities (15% to 20%)

Project Student Enrollment
Evaluate Instructional Program(s) Costs
Develop Annual Budgets
Manage Grant Activities
Prepare for Annual Audit

Conduct Risk Management Activities (10% to 15%)

Evaluate Existing Risks
Address Results of Risk Audit
Conduct Annual Evaluation of Insurance Plans
Manage Insurance Plans

Manage School Facilities (7% to 12%)

Update Facility Master Plan

Oversee the Operation and Maintenance of School Campuses

Oversee New Construction and Renovations

Manage Information Systems (4% to 6%)

Assist in Developing a Technology Plan

Maintain Technology Systems/Oversee Telecommunication Systems

Manage Human Resource Functions (15% to 20%)

Manage Hiring of New Employees

Develop Compensation Structure

Manage Staff Development and Training Programs

Manage Evaluation Process

Manage Personnel Administration

Manage Employee Benefit Programs

Manage Ancillary Services (7% to 12%)

Manage Transportation Services

Manage Food Service Programs

Manage Purchasing Process

Manage Other Service Programs

Acknowledgments

ASBO International thanks the Job Task Analysis Panel for their dedication to the project, as well as all of the survey respondents who contributed. ASBO International also thanks Professional Testing, Inc. for their expertise and work on the project.

Looking for More Information?

Eager to learn more about ASBO International's certification program or the job task analysis process. Visit ASBO International's website, www.asbointl.org, or contact Pam Weber at pweber@asbointl.org.