



Observer Assessment of Professional Standards

Participant's Name: _____

Observer's Name: _____ **Date:** _____

Purpose:

This Observer Assessment is to be distributed to professionals who are able to assess their colleague's practices because they are familiar with that person's job responsibilities and recent work. Once an observer has completed his or her assessment, this document is to be returned to the participant. The participant will then compare it to the Self-Assessment using the Skills Analysis Sheet (both available as separate documents).

You, the observer, are helping your school business colleague form a realistic impression of his or her skill levels. Your colleague will accomplish this by comparing this Observer Assessment against his or her parallel Self-Assessment.

This professional assessment process is intended for your colleague's personal use; as such, your ratings and comments should remain confidential between you and your colleague.

You are to give an honest appraisal of your colleague's current practices and on-the-job behavior as they relate to each skill dimension. After you have rated your colleague's job practices on the Observer Assessment charts, you will arrive at a total Skill Quotient for each skill dimension. Once your colleague collects your assessment and compares his or her self-assessed Skill Quotients with those from other observers, he or she will be able to form a clear picture of his or her skill levels and how those skills come across when working with others on the job.

Instructions:

The following skill set is composed of a general definition of the skills to be assessed, followed by two or more skill dimensions (A, B, C, etc.), and a series of specific statements on job behavior.

1. Read the definition for each skill set.
2. Reflect on your colleague's current behavior and practices as they relate to the skill area and its definition.
3. Read each behavioral statement within the skill dimensions and circle the number for each item as it best describes your colleague's behavior along the given scale. Be honest – remember that this professional assessment is intended for your colleague's personal use, and your responses should be kept private for that purpose only.



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4. 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.
5. After completing all of the charts within the skill sets you have been asked to complete, return the full Observer Assessment to your colleague.

For assistance or additional information, visit the [ASBO International website](#), or contact our Professional Development staff at 866.682.2729 x7074, or by email at aolkin@asbointl.org.



The Educational Enterprise

The public is giving more attention to the relationship between a school’s sound business practices and the quality education of students. Legislative mandates from all levels of government, such as the No Child Left Behind Act in the United States, have drawn more scrutiny about the utilization of resources in schools. School business officials have been recognized as being central to the successful operation of the educational enterprise. School business practices permeate the entire school district. The local education enterprise often maintains the largest budget in the community. Therefore, due to the public’s increased demand for accountability, transparency, and independence; the challenge to do more with less; and the expertise needed to manage the financial resources of the school, the school business official must endorse certain standards in organization and administration, public policy and intergovernmental relations, and the legal framework of our public school districts.

A. Organization and Administration

The school business official understands and demonstrates the following abilities:

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

1.	This person identifies and applies various organizational leadership models.	1	2	3	4	5	NA
2.	This person identifies techniques for motivating others, delegating authority, making decisions, processing information, planning, and allocating resources.	1	2	3	4	5	NA
3.	This person examines methods of assigning personnel and resources to accomplish specific goals and objectives, and utilizes scheduling techniques for the coordination of tasks to maximize personnel and resource utilization.	1	2	3	4	5	NA
4.	This person identifies problems, secures relevant information, and recognizes possible causes of conflict.	1	2	3	4	5	NA
5.	This person utilizes questioning techniques, fact-finding, categorizing information, and retention of relevant data.	1	2	3	4	5	NA
6.	This person applies concepts of change, group dynamics, interpersonal relationships, and effective problem solving.	1	2	3	4	5	NA
7.	This person delegates and assigns responsibilities to staff; collects, analyzes, and evaluates information to generate contingency plans; and applies basic concepts of organizational development.	1	2	3	4	5	NA
8.	This person maintains a positive working relationship with all staff.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Organization and Administration Skill Quotient: _____					



B. Public Policy and Intergovernmental Relations

The school business official understands and demonstrates the following abilities:

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

1.	This person develops and applies the policies and roles of all relevant education authorities and local and national governments.	1	2	3	4	5	NA	
2.	This person identifies the role of special interest groups (public and private) within a school district, and their ability to influence those who approve district policy.	1	2	3	4	5	NA	
3.	This person analyzes the political and legislative process as it relates to local board elections, municipal governments, state/provincial legislatures, and other governmental jurisdictions.	1	2	3	4	5	NA	
4.	This person uses the skills necessary to interpret and evaluate local school board policies and administrative procedures to ensure consistent application in the daily operation of the school district.	1	2	3	4	5	NA	
Add up the circled numbers, divide the sum by 4, and enter the result here:							Public Policy and Inter-Governmental Relations Skill Quotient: _____	

C. Legal Issues

The school business official understands and demonstrates the following abilities:

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

1.	This person identifies the local and national constitutional rights that apply to individuals within the public and private education system.	1	2	3	4	5	NA	
2.	This person reviews and analyzes appropriate statutory and constitutional authority regarding the administration of public and private schools.	1	2	3	4	5	NA	
3.	This person reviews and analyzes significant statutory and case law relative to financial resource management, human resource management, facility management, property management acquisition, information management including freedom of information and protection of privacy, and management of ancillary services.	1	2	3	4	5	NA	
4.	This person applies the highest values and ethical standards as they relate to the entire profession of school business administration.	1	2	3	4	5	NA	
5.	This person protects all stakeholders' interests with respect to responsibility and financial integrity.	1	2	3	4	5	NA	
Add up the circled numbers, divide the sum by 5, and enter the result here:							Legal Issues Skill Quotient: _____	



Financial Resource Management

School business officials must be able to understand and demonstrate the principles associated with school finance, budgeting, financial planning, accounting, auditing, financial reporting, cash management, investments, debt management, and technology for school business operations.

A. Principles of School Finance

The school business official understands and demonstrates the following abilities:

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

1.	This person applies economic and financial markets/theories.	1	2	3	4	5	NA
2.	This person recognizes and forecasts the major sources of revenue available to the school district from local and national governments and other sources.	1	2	3	4	5	NA
3.	This person interprets the relevant governmental funding model.	1	2	3	4	5	NA
4.	This person analyzes the impact of shifts in local and national funding and the effect on local spending plans.	1	2	3	4	5	NA
5.	This person applies multiple techniques for identifying expenditures across cost centers and programs.	1	2	3	4	5	NA
6.	This person explores alternative and innovative revenue sources.	1	2	3	4	5	NA
7.	This person recognizes and analyzes significant social, demographic, and economic changes that may impact the financial plan of the district.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:		Principles of School Finance Skill Quotient: _____					



B. Budgeting and Financial Planning

The school business official understands and demonstrates the following abilities:

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

1.	This person prepares a budget calendar to meet the time constraints of budget preparation.	1	2	3	4	5	NA
2.	This person uses multiple approaches to determine reliable enrollment and personnel projections.	1	2	3	4	5	NA
3.	This person forecasts anticipated expenditures by program.	1	2	3	4	5	NA
4.	This person identifies various methods of budget analysis and management.	1	2	3	4	5	NA
5.	This person applies statistical process control techniques for budgetary analysis.	1	2	3	4	5	NA
6.	This person applies the legal requirements for budget adoption.	1	2	3	4	5	NA
7.	This person prepares revenue projections and estimates of expenditures for school sites and district-wide budgets.	1	2	3	4	5	NA
8.	This person recognizes and explains internal and external influences on the budget.	1	2	3	4	5	NA
9.	This person maximizes state/provincial/national aids for the district.	1	2	3	4	5	NA
10.	This person communicates the relationship between programs, revenues, and appropriations of the school district to the stakeholders.	1	2	3	4	5	NA
11.	This person develops multi-year budgets that serve as a communications tool for the stakeholders.	1	2	3	4	5	NA
12.	This person develops a financial model to monitor a school district's financial health.	1	2	3	4	5	NA
13.	This person analyzes comparable data of other school districts.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 13, and enter the result here:		Budgeting and Financial Planning Skill Quotient: _____					



C. Accounting, Auditing, and Financial Reporting

The school business official understands and demonstrates the following abilities:

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

1.	This person obtains the services of an internal and external auditor.	1	2	3	4	5	NA
2.	This person establishes and verifies compliance with finance-related legal and contractual provisions.	1	2	3	4	5	NA
3.	This person communicates the relationship between programs, revenues, and appropriations of the school district to the stakeholders.	1	2	3	4	5	NA
4.	This person prepares, analyzes, and reports financial statements and supporting discussion documents to the board of education throughout the fiscal year.	1	2	3	4	5	NA
5.	This person prepares a corrective action plan from the information conveyed in the annual audit report to improve financial tracking and reporting and internal controls and guide the implementation of the plan.	1	2	3	4	5	NA
6.	This person applies concepts and standards of accounting relevant to the district's location.	1	2	3	4	5	NA
7.	This person adheres to the accounting standards-setting governing body and prepares financial statements in accordance with the most current standards as issued by such body.	1	2	3	4	5	NA
8.	This person reports the financial status of the district to the appropriate state/provincial agency in the appropriate regulatory format, which may be on a generally accepted accounting basis or on a customized/regulated basis of reporting.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Accounting, Auditing, and Financial Reporting Skill Quotient: _____					



D. Cash Management, Investments, and Debt Management

The school business official understands and demonstrates the following abilities:

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

1.	This person selects professional advisors/contractors such as bond counsel, rating agencies, financial advisors, and underwriters.	1	2	3	4	5	NA
2.	This person uses lease purchasing and partners with other jurisdictions such as municipalities, counties, and other school districts.	1	2	3	4	5	NA
3.	This person develops/recommends investment policies for the governing board to include investment objectives such as maximizing investment income and preserving the investment principal.	1	2	3	4	5	NA
4.	This person develops specifications for the selection of banking and other financial services.	1	2	3	4	5	NA
5.	This person applies the concept of compensating balances.	1	2	3	4	5	NA
6.	This person comprehends procedures and legal constraints for cash collection and disbursement.	1	2	3	4	5	NA
7.	This person calculates the yields and understands the risks of various investment options legally available to a school district.	1	2	3	4	5	NA
8.	This person applies various methods of cash forecasting.	1	2	3	4	5	NA
9.	This person applies appropriate types of short-term debt financing instruments available to school districts.	1	2	3	4	5	NA
10.	This person analyzes monthly internal transfers and loans.	1	2	3	4	5	NA
11.	This person analyzes the legal constraints and methods of issuing long-term general obligation bonds, including the bond rating process and the role of the bonding attorney and rating services.	1	2	3	4	5	NA
12.	This person analyzes the implications of arbitrage rules that may apply to the issuance of long-term general obligation bonds and provides for arbitrage payable when appropriate.	1	2	3	4	5	NA
13.	This person prepares a cash flow analysis, including a fund balance report, for the board of education.	1	2	3	4	5	NA
14.	This person reviews accrued receivables and understand permitted collection processes.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 14, and enter the result here:</p>		<p>Cash Management, Investments, and Debt Management Skill Quotient: _____</p>					



E. Technology for School Finance Operations

The school business official understands and demonstrates the following abilities:

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

1.	This person keeps current with technology applications and programs.	1	2	3	4	5	NA
2.	This person assess the district's needs related to available budget dollars for technology.	1	2	3	4	5	NA
3.	This person ensures that the district's technology plan is designed to meet the district's goals.	1	2	3	4	5	NA
4.	This person develops an operational plan to meet the district's financial goals and objectives.	1	2	3	4	5	NA
5.	This person applies economic and financial markets/theories.	1	2	3	4	5	NA
6.	This person recognizes and forecasts the major sources of revenue available to the school district from local and national governments and other sources.	1	2	3	4	5	NA
7.	This person interprets the relevant governmental funding model.	1	2	3	4	5	NA
8.	This person analyzes the impact of shifts in local and national funding and the effect on local spending plans.	1	2	3	4	5	NA
9.	This person applies multiple techniques for identifying expenditures across cost centers and programs.	1	2	3	4	5	NA
10.	This person explores alternative and innovative revenue sources.	1	2	3	4	5	NA
11.	This person recognizes and analyzes significant social, demographic, and economic changes that may impact the financial plan of the district.	1	2	3	4	5	NA
<p>Add up the circled numbers, divide the sum by 11, and enter the result here:</p>		<p>Technology for School Finance Operations Skill Quotient: _____</p>					



Human Resource Management

In the education sector, the critical importance of human resource management is the administration and monitoring of personnel, benefits, professional development, labor relations, employment agreements, and the fostering of human relations.

Human resource management, while involving many day-to-day practical considerations, also requires an understanding of both theory and practice, recognizing that theory often determines practice. School business officials cannot fulfill their human resource management role efficiently and effectively without being aware of relevant management concepts and theories as well as local and national rules and regulations.

A. Personnel and Benefits Administration

The school business official understands and demonstrates the following abilities:

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

1.	This person coordinates the development and management of an appropriate personnel database to provide seamless integration with payroll and other school district functions.	1	2	3	4	5	NA
2.	This person manages and continually evaluates the effectiveness of the school district's payroll operations.	1	2	3	4	5	NA
3.	This person administers employment agreements, including interpreting contract language, considering the concepts of "past practice," "just cause" provisions, and grievance procedures.	1	2	3	4	5	NA
4.	This person assists with the processes related to the recruitment, selection, orientation, assignment, evaluation, and termination of school district personnel.	1	2	3	4	5	NA
5.	This person ensures the selection and hiring of the most qualified individuals for positions, adhering to all local and national rules and regulations.	1	2	3	4	5	NA
6.	This person researches and explains various compensation arrangements, including salaries and wages, employee healthcare benefit programs, and retirement options.	1	2	3	4	5	NA
7.	This person coordinates the procedures for termination of employment, including the concept of "due process," and an awareness of the procedures, usually governed by collective bargaining agreements, with respect to reduction in work force.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:		Personnel and Benefits Administration Skill Quotient: _____					



B. Professional Development

The school business official understands and demonstrates the following abilities:

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

1.	This person conducts needs assessments to identify areas and content for training and development.	1	2	3	4	5	NA
2.	This person builds a professional development system, based primarily on adult motivation research, to improve the performance of staff members and to assist staff in meeting the educational objectives of the school district.	1	2	3	4	5	NA
3.	This person ensures all staff meets training and continuing education requirements to comply with local and national rules and regulations.	1	2	3	4	5	NA
4.	This person identifies appropriate procedures for the management and evaluation of professional development programs.	1	2	3	4	5	NA
5.	This person involves all school district staff in determining their professional development needs that can significantly enhance the effectiveness of employee training and development programs.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Professional Development Skill Quotient: _____

C. Labor Relations and Employment Agreements

The school business official understands and demonstrates the following abilities:

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

1.	This person analyzes jurisdictional and governmental laws and regulations with respect to employment agreements.	1	2	3	4	5	NA
2.	This person continually conducts and analyzes benchmark surveys to assess the cost of current salary and employee benefit packages and proposals.	1	2	3	4	5	NA
3.	This person analyzes current employment contracts and/or collective bargaining agreements and develops comparative reports with local and national agreements.	1	2	3	4	5	NA
4.	This person identifies and monitors compliance with the grievance procedures as set out in employment agreements and local and national law.	1	2	3	4	5	NA
5.	This person reviews local and national laws and regulations with respect to impasse procedures such as mediation, voluntary arbitration, and binding arbitration.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Labor Relations and Employment Agreements: Skill Quotient: _____



D. Human Relations

The school business official understands and demonstrates the following abilities:

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

1.	This person diagnoses, maintains, and when necessary, improves organizational health and morale, including increasing focus on employee wellness programs.	1	2	3	4	5	NA
2.	This person develops policies and procedures for the management of school district personnel.	1	2	3	4	5	NA
3.	This person develops employee assistance programs and evaluates their impact on the school district's staff morale.	1	2	3	4	5	NA
4.	This person frequently monitors performance through constructive evaluations, including a comparison of standards and goal-setting to ensure accountability.	1	2	3	4	5	NA
5.	This person identifies and implements procedures for conflict resolution and team building to enhance morale and productivity.	1	2	3	4	5	NA
6.	This person helps create a high performance work system by fostering open communication and feedback throughout all levels of the district.	1	2	3	4	5	NA
7.	This person recognizes and promotes compliance with standards of ethical behavior and standards for professional conduct applicable to all school district staff.	1	2	3	4	5	NA
8.	This person stays current with management theory and leadership styles, including concepts of behavioral science, organizational structure theory, developing and maintaining organizational culture, and managing organizational change.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Human Relations Skill Quotient: _____					



Facility Management

Research on learning has validated the effect of the environment on the learner. Factors such as sound, light, temperature, and the design of space affect the ability of individuals to learn and work. Hence, effective and efficient facility management contributes to the educational process by providing the environment in which instructional programs are delivered. Expertise in areas such as physical plant planning, accountability for capital resources, and administration of the substantial public investment in schools are basic performance competencies for school business officials.

A. Planning and Construction

The school business official understands and demonstrates the following abilities:

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

1.	This person develops a long-range facility plan that includes demographic data and serves as an integral member of the planning team.	1	2	3	4	5	NA
2.	This person develops a working knowledge of funding sources and issues related to school construction, including bond ratings, the rating process, and bond election processes.	1	2	3	4	5	NA
3.	This person develops appropriate procedures for selecting architects, engineers, construction managers, and other professionals.	1	2	3	4	5	NA
4.	This person applies the steps and procedures involved in developing and using education specifications for selecting school sites.	1	2	3	4	5	NA
5.	This person reviews the legal and administrative responsibilities for advertising, awarding, and managing construction contracts.	1	2	3	4	5	NA
6.	This person recognizes the impact of energy and environmental factors on the learning process.	1	2	3	4	5	NA
7.	This person meets the requirements of local and national agencies regarding construction and renovation of school facilities.	1	2	3	4	5	NA
8.	This person communicates financial implications of unanticipated issues during the construction process to appropriate personnel in order to guarantee project solvency.	1	2	3	4	5	NA
9.	This person involves appropriate existing district/agency personnel who have experience with local energy demands, materials choices, and contractor regulations to share their concerns during construction job progress meetings.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:		Planning and Construction Skill Quotient: _____					



B. Maintenance and Operations

The school business official understands and demonstrates the following abilities:

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

1.	This person administers procedures required to keep schools clean, safe, and secure through effective custodial services and preventive maintenance.	1	2	3	4	5	NA
2.	This person manages energy consumption and environmental aspects.	1	2	3	4	5	NA
3.	This person determines resource allocation for maintenance and operations.	1	2	3	4	5	NA
4.	This person develops a crisis management plan.	1	2	3	4	5	NA
5.	This person maintains a positive working relationship with staff, contractors, and suppliers.	1	2	3	4	5	NA
6.	This person is knowledgeable of sources of alternative revenue (other than debt or tax levies) such as grant revenue to meet facility needs.	1	2	3	4	5	NA
7.	This person is able to effectively form partnerships with the private sector to enhance resources available to the district in regard to facilities and equipment.	1	2	3	4	5	NA
8.	This person utilizes technology to improve facilities through data management.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Maintenance and Operations Skill Quotient: _____					



Property Acquisition and Management

Effective acquisition of property, materials, equipment, and services requires a systematic purchasing system operated by established procedures and managed by competent professionals. Acquiring the products and services needed for the educational enterprise is an integral part of the instructional program. Accountability in education begins with the procurement of school property and materials. Effective, efficient, and proper procurement of property, materials, equipment, and services supports accountability in education. School business officials coordinate the economic, efficiency, and cost-effectiveness of property acquisition and management according to appropriate laws and ethical practices.

A. Purchasing

The school business official understands and demonstrates the following abilities:

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

1.	This person develops and implements an integrated purchasing process that complies with all government regulations.	1	2	3	4	5	NA
2.	This person adheres to a strict code of purchasing and procurement ethics.	1	2	3	4	5	NA
3.	This person develops and implements a bid procurement system that complies with all government regulations.	1	2	3	4	5	NA
4.	This person analyzes and, if feasible, implements an e-procurement system that complies with all government regulations.	1	2	3	4	5	NA
5.	This person obtains good value for each procurement.	1	2	3	4	5	NA
6.	This person properly and effectively applies the rules, regulations, and statutes that govern school procurement.	1	2	3	4	5	NA
7.	This person determines and produces the most appropriate method of source selection for each procurement.	1	2	3	4	5	NA
8.	This person formulates competitive procurement solicitations that are fair and reasonable and that promote open competition.	1	2	3	4	5	NA
9.	This person conducts all procurement without conflict of interest, impropriety, or any attempt to obtain personal gain.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:		Purchasing Skill Quotient: _____					



B. Supply and Fixed Asset Management

The school business official understands and demonstrates the following abilities:

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

1.	This person develops and implements a system to manage and track supply inventories and distribution.	1	2	3	4	5	NA
2.	This person develops and implements a program for the effective current and long-range acquisition, maintenance, and repair of equipment.	1	2	3	4	5	NA
3.	This person develops a system to reallocate and/or dispose of surplus, scrap, and obsolete materials and equipment.	1	2	3	4	5	NA
4.	This person develops and implements a system for the proper valuation, classification, and depreciation of fixed assets.	1	2	3	4	5	NA
5.	This person develops and implements a system to adequately control and account for capital assets.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:							Supply and Fixed Asset Management Skill Quotient: _____

C. Real Estate Management

The school business official understands and demonstrates the following abilities:

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

1.	This person coordinates with other government agencies regarding zoning, land use, and other real estate issues.	1	2	3	4	5	NA
2.	This person develops and implements procedures for the acquisition and disposal of land and buildings.	1	2	3	4	5	NA
3.	This person develops and implements a use of facility system that complies with all government regulations.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 3, and enter the result here:							Real Estate Management Skill Quotient: _____



Information Management

In a technological environment where information flows to and from school organizations in gigabytes per second, the prerequisite competencies to direct, protect, analyze, and update this information has become a primary focus for school business officials. Ultimately, information management is more than simply overseeing technical data; it also involves the presentation and articulate communication of information to key decision-making individuals and groups.

A. Strategic Planning

The school business official understands and demonstrates the following abilities:

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

1.	This person participates in administrative and employee teams in the identification of short- and long-term goals in all aspects of school district activities.	1	2	3	4	5	NA	
2.	This person assists with the development and communication of a vision of the preferred future of the school district, drawing from current research and best practice.	1	2	3	4	5	NA	
3.	This person assists in the development of a strategic plan that will move the district toward the achievement of its mission and goals.	1	2	3	4	5	NA	
4.	This person assists in providing the data required to facilitate the strategic planning process.	1	2	3	4	5	NA	
5.	This person assists in the implementation, monitoring, evaluation, reporting, and revision of a strategic plan.	1	2	3	4	5	NA	
Add up the circled numbers, divide the sum by 5, and enter the result here:							Strategic Planning Skill Quotient: _____	



B. Instructional Support Program Evaluation

The school business official understands and demonstrates the following abilities:

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

1.	This person applies a practical and research-based knowledge of the components and skills to evaluate programs and business services.	1	2	3	4	5	NA
2.	This person identifies various economic and cost factors inherent in program operation and evaluation.	1	2	3	4	5	NA
3.	This person develops and applies procedures for the systematic evaluation of instructional support programs.	1	2	3	4	5	NA
4.	This person analyzes, develops, and applies various methods of measuring instructional goals and program effectiveness.	1	2	3	4	5	NA
5.	This person effectively manages a change process when evaluation determines that instructional support programs must be improved.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 5, and enter the result here:		Instructional Support Program Evaluation Skill Quotient: _____					



C. Instructional Program Evaluation

The school business official understands and demonstrates the following abilities:

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

1.	This person supports the components of the instructional programs within the school district.	1	2	3	4	5	NA
2.	This person participates in the planning and implementation of instructional program improvement.	1	2	3	4	5	NA
3.	This person analyzes the various economic factors associated with the delivery and evaluation of instructional programs.	1	2	3	4	5	NA
4.	This person develops procedures for the evaluation and reporting of the cost effectiveness of instructional programs.	1	2	3	4	5	NA
5.	This person utilizes evaluation data toward the development of instructional program changes.	1	2	3	4	5	NA
6.	This person effectively participates in the change process when instructional programs must be improved.	1	2	3	4	5	NA
7.	This person assists in the direction and facilitation of the allocation of resources within the school district toward the improvement of instructional programs.	1	2	3	4	5	NA
8.	This person assists in directing and promoting the allocation of resources for professional development leading to improved instructional programs.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Instructional Program Evaluation Skill Quotient: _____					



D. Communications

The school business official understands and demonstrates the following abilities:

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

1.	This person comprehends effective communication strategies and techniques related to mass and interactive communications.	1	2	3	4	5	NA
2.	This person identifies the primary components of public information management and public relations.	1	2	3	4	5	NA
3.	This person has a clear understanding of the major constituencies within the school district.	1	2	3	4	5	NA
4.	This person presents financial data to various school and community groups in written, oral, and multi-media formats.	1	2	3	4	5	NA
5.	This person assists in the development of a plan for a positive school–community relations program for the business office and the school district.	1	2	3	4	5	NA
6.	This person assists in the development of procedures for the management of public information programs and departments that relate to school–community relations.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 6, and enter the result here:		Communications Skill Quotient: _____					



E. Management Information Systems

The school business official understands and demonstrates the following abilities:

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

1.	This person directs or develops management information systems.	1	2	3	4	5	NA
2.	This person applies the most current technology to the storage, analysis, and communication of data (fax, electronic mail, administrative and educational computer systems, etc.).	1	2	3	4	5	NA
3.	This person evaluates the cost benefits and organizational value of producing information.	1	2	3	4	5	NA
4.	This person develops, maintains, and validates a records management system using appropriate technology that complies with all legal requirements.	1	2	3	4	5	NA
5.	This person develops and maintains an accurate database to facilitate management decisions using current information management techniques.	1	2	3	4	5	NA
6.	This person administrates a computerized management information system.	1	2	3	4	5	NA
7.	This person ensures that appropriate data security and privacy of records are maintained.	1	2	3	4	5	NA
8.	This person assists in the integration and gathering of information for public relations purposes.	1	2	3	4	5	NA
9.	This person assists in and coordinates the gathering and reporting of information for government reports.	1	2	3	4	5	NA
10.	This person maintains and protects the historical records archive of the school district.	1	2	3	4	5	NA
11.	This person assists in the development and implementation of technology in the business office and the classroom environment.	1	2	3	4	5	NA
12.	This person maintains a working knowledge of the technology and software available for school and business office use.	1	2	3	4	5	NA
13.	This person directs or develops specific plans for secure student and employee access to the Internet.	1	2	3	4	5	NA
14.	This person evaluates the cost of Internet access options for the school district.	1	2	3	4	5	NA
15.	This person evaluates and applies various technology tools for use in the school and business office.	1	2	3	4	5	NA
16.	This person assists in the development of long-range technology planning for the school district.	1	2	3	4	5	NA
17.	This person promotes and assists in the development of technology training for all staff.	1	2	3	4	5	NA
18.	This person allocates appropriate resources toward the purchase and installation of technology and technology infrastructures in the business office, the school office, and the classroom.	1	2	3	4	5	NA
19.	This person develops appropriate specifications for purchasing technology and contracting for technology infrastructure for the school district..	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 19, and enter the result here:		Management Information Systems Skill Quotient: _____					



Ancillary Services

A. Risk Management

All schools risk suffering loss or damage to their property, personnel, and reputation, which may affect their ability to deliver services. Risk management and contingency planning can be used to anticipate and limit those risks that may affect the activities of the school.

Risk management also plays a role in developing standards of benchmarking, best practices, and performance measurement. Financial standards such as claim statistics and cost-of-risk analysis are important measures of efficiency but are not true measures of risk management effectiveness when used alone. Other areas that must be measured include strategies to contain costs of workers' compensation, litigation management, employee relations, loss control, and general cost containment.

The school business official understands and demonstrates the following abilities:

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

1.	This person ensures that a comprehensive risk management program is in place.	1	2	3	4	5	NA
2.	This person ensures the risk management program addresses safety and security.	1	2	3	4	5	NA
3.	This person assesses risk management programs and recommends changes consistent with district needs.	1	2	3	4	5	NA
4.	This person identifies and applies models for the evaluation of potential risk management programs.	1	2	3	4	5	NA
5.	This person identifies and evaluates alternative methods of funding and managing risk.	1	2	3	4	5	NA
6.	This person communicates the risk management program to all stakeholders.	1	2	3	4	5	NA
7.	This person directs the process of selecting/employing an insurance consultant or risk manager.	1	2	3	4	5	NA
8.	This person adheres to legal requirements for insurance coverage.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 8, and enter the result here:		Risk Management Skill Quotient: _____					



B. Transportation

The transportation of students is a major logistical task for all school districts. In addition to getting the students to and from school, the system must provide transportation for field trips and cocurricular activities. In the United States, it is one of the largest public mass transportation systems. Given the volume of vehicles, passengers, and miles traveled, transportation management can be a daunting challenge.

The school business official understands and demonstrates the following abilities:

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

1.	This person supports and maintains a student transportation program that adheres to all legal requirements.	1	2	3	4	5	NA
2.	This person ensures that the school bus maintenance and replacement program is established and maintained.	1	2	3	4	5	NA
3.	This person monitors the student transportation program for its safety, security, and efficiency and makes adjustments as needed.	1	2	3	4	5	NA
4.	This person analyzes alternative methods available for providing transportation.	1	2	3	4	5	NA
5.	This person ensures an efficient and comprehensive routing system is developed and maintained.	1	2	3	4	5	NA
6.	This person ensures a comprehensive plan is in place that includes an analysis of what transportation requirements are and the basic features of a system to provide pupil transportation, and where appropriate, arrangements for screening, training, re-training and retaining bus drivers, paraprofessionals, and other essential transportation personnel.	1	2	3	4	5	NA
7.	This person develops and maintains open and clear lines of communication with parents, staff, administration, state/provincial legislatures, and the public for the purpose of conveying the responsibilities, needs, and expectations of all stakeholders.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 7, and enter the result here:		Transportation Skill Quotient: _____					



C. Food Service

International studies confirm that children who eat nutritious meals perform better academically, show improved behavior, and are physically healthier. School districts use different approaches to ensure children are receiving nutritious meals/snacks. Breakfast programs, lunch programs, and after-school meals/snacks are provided through contracted or provision of services.

The school business official understands and demonstrates the following abilities:

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

1.	This person establishes procedures for the implementation and operation of the food service program.	1	2	3	4	5	NA
2.	This person adheres to the legal requirements of the food service program, including local and national government guidelines.	1	2	3	4	5	NA
3.	This person monitors the food service program and makes adjustments as needed.	1	2	3	4	5	NA
4.	This person ensures the management systems for tracking meals and inventories are in place and identifies participant status.	1	2	3	4	5	NA
5.	This person manages and controls inventories and procurement.	1	2	3	4	5	NA
6.	This person ensures compliance with required nutritional value.	1	2	3	4	5	NA
7.	This person analyzes the methods available for providing food service and identifies and recommends the most beneficial methods for a given situation.	1	2	3	4	5	NA
8.	This person works with nutrition and regulatory agencies relative to planning, conducting, and reporting of catering service programs within the school.	1	2	3	4	5	NA
9.	This person ensures effective cash handling procedures and internal controls.	1	2	3	4	5	NA
Add up the circled numbers, divide the sum by 9, and enter the result here:		Food Service Skill Quotient: _____					