
ILLINOIS LICENSURE TESTING SYSTEM

FIELD 224: CHIEF SCHOOL BUSINESS OFFICIAL TEST FRAMEWORK

May 2018

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Effective beginning June 8, 2020

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TEST FRAMEWORK

May 2018

Subarea	Range of Objectives
I. Educational Leadership	0001–0003
II. School District Financial Leadership	0004–0008
III. School District Operations and Services Leadership	0009–0013

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Educational Leadership
School District Financial Leadership
School District Operations and Services Leadership

SUBAREA I—EDUCATIONAL LEADERSHIP

0001 Understand the foundations of public education and skills and the personal qualities associated with educational leadership.

For example:

- Demonstrate knowledge of the historical, social, and philosophical foundations of the U.S. public school system.
- Demonstrate knowledge of key leadership skills and their implications for identifying and using financial and other resources to support the district's vision.
- Demonstrate understanding of the school's responsibility for supporting the cognitive, physical, and social-emotional development of all students.
- Apply knowledge of strategies and procedures, including scheduling techniques, for effectively using personnel and other resources to accomplish goals and coordinate tasks.
- Apply knowledge of principles and procedures for identifying problems, recognizing possible causes of conflict, and evaluating possible consequences of actions.
- Apply knowledge of procedures for collecting, analyzing, and evaluating various types of information and past decisions to generate alternative solutions, make decisions, and formulate contingency plans.
- Demonstrate knowledge of the components of clear, concise, and effective communication in various educational contexts.
- Apply knowledge of effective communication strategies and techniques used in public or mass communications (e.g., districtwide communication, communicating with school board and other stakeholders).
- Apply knowledge of how to work effectively with individuals and groups with competing or conflicting perspectives, including cultural and social differences that impact the school community.

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- Apply knowledge of ethical and professional behavior in relation to personal conduct, interactions with others, decision making, stewardship of the district's resources, and all aspects of leadership.
- Apply knowledge of how to advocate for the needs and priorities of students, families, and the community.

0002 Understand procedures for using strategic planning and evaluating school district programs and services.

For example:

- Demonstrate knowledge of strategies and techniques for supporting administrative and employee teams in identifying short-term and long-term goals in all aspects of school district functioning.
- Demonstrate knowledge of the role of fiscally sound policies and practices in supporting the development of strategic plans that will move the district toward achievement of its educational vision, mission, and goals.
- Demonstrate understanding of the value of sustaining productive partnerships with public and private sector entities, and ways of employing community, cultural, social, intellectual, and political resources to promote student learning and district improvement.
- Apply knowledge of how to support the development and implementation of procedures for systematically evaluating district instructional and noninstructional programs (e.g., data analysis, analytics).
- Apply knowledge of economic and cost factors inherent in program evaluation and sustainability.
- Demonstrate knowledge of alternative methods of measuring program outcomes.
- Demonstrate knowledge of how to evaluate, assess, and implement the change process for programs.

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0003 Understand public education policy, intergovernmental relations, and legal aspects of educational leadership.

For example:

- Demonstrate knowledge of the educational policies, functions, and roles of state boards of education, state legislatures, municipal governments, and the federal government.
- Demonstrate knowledge of the structure and functions of school governance at the district level (e.g., local boards of education).
- Demonstrate knowledge of how to develop, evaluate, assess, update, and implement district policies.
- Demonstrate understanding of the relationship between the chief school business official, the superintendent, the administration team, and the local board of education.
- Demonstrate understanding of the roles and limitations of stakeholders, including special interest groups within a school district and their ability to influence those who approve district policy.
- Apply knowledge of major legislative acts guaranteeing the right of an education to all people and state and federal constitutional rights that apply to individuals within the public education system.
- Demonstrate knowledge of statutory and constitutional authority governing the general administration of public schools and the relationship between public schools to private, parochial, charter, and other nontraditional schools.
- Apply knowledge of significant statutory and case laws related to the management of school financial resources, human resources, technology, facilities, risk management, information, transportation, food service, and other ancillary services.

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SUBAREA II—SCHOOL DISTRICT FINANCIAL LEADERSHIP

0004 Understand principles and procedures of public school finance and budgeting.

For example:

- Demonstrate knowledge of public school funding; major sources of revenue at the local, state, and federal levels; and how to explore alternative and innovative revenue sources (e.g., grants).
- Demonstrate knowledge of how significant increases or decreases in funding from state and local sources of revenue affect a school district's financial stability.
- Apply knowledge of principles and procedures used in estimating, recommending, and filing a school district tax levy.
- Apply knowledge of principles and procedures used in preparing and managing a school district budget, including the preparation of a budget calendar and closing out the budget at the end of a fiscal year.
- Apply knowledge of various approaches for projecting student enrollment, changes in enrollment, and personnel needs.
- Apply knowledge of procedures for forecasting anticipated revenues and expenditures and preparing revenue projections and estimates of expenditures.
- Demonstrate knowledge of legal requirements for budget, and levy adoption, and management.
- Apply knowledge of budget analysis and management procedures, including statistical trend data used for budgetary analysis.
- Analyze internal and external influences on school budgets.

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0005 Understand principles and procedures for accounting, auditing, and financial reporting.

For example:

- Apply knowledge of business accounting principles and procedures (e.g., preparing revenues and expenditures by fund using the appropriate state chart of accounts).
- Demonstrate knowledge of how to present fairly and with full disclosure the financial position and results of financial operations of funds and account groups of the school district.
- Demonstrate knowledge of the appropriate uses of bases of accounting (i.e., modified accrual basis, accrual basis, or cash basis) in measuring financial positions and operating results.
- Apply knowledge of principles and techniques for preparing interim, monthly, and annual statements of financial positions and operating results; analyzing monthly and annual financial statements; and communicating how the budget and available resources support school and district programs.
- Demonstrate knowledge of procedures for establishing and verifying compliance with finance-related legal, statutory, regulatory (e.g., Governmental Accounting Standards Board [GASB], generally accepted accounting principles [GAAP]), and contractual provisions.
- Demonstrate knowledge of internal auditing practices and appropriate segregation of duties and procedures.
- Demonstrate knowledge of the duties, roles, and qualifications of independent auditors.

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0006 Understand cash management, investment, and debt management procedures.

For example:

- Demonstrate understanding of banking and investing services as well as developing specifications for the selection of those services.
- Demonstrate knowledge of how to evaluate the risks and calculate the yields on various permitted investment options available to a school district.
- Apply knowledge of how to use various methods of cash forecasting and how to prepare a cash flow analysis for a school district.
- Demonstrate knowledge of procedures, internal controls, and legal constraints related to cash collection and disbursements.
- Demonstrate knowledge of types, limitations, and benefits of various short-term financing instruments available to school districts.
- Demonstrate knowledge of processes, methods, and legal constraints related to issuing long-term general obligation bonds (e.g., bond rating process, role of rating services).
- Demonstrate understanding of the concept of appropriate fund balance management.

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0007 Understand purchasing procedures and supply and fixed asset management.

For example:

- Demonstrate knowledge of appropriate purchasing procedures (e.g., segregation of duties, requisitioning and approving purchases).
- Demonstrate knowledge of how to apply accounting principles and procedures to the bidding and purchasing process (e.g., request for proposal [RFP], request for qualifications [RFQ]).
- Apply knowledge of legal, ethical, and public disclosure considerations or requirements related to bidding, purchasing, and working with vendors.
- Demonstrate knowledge of procedures for using computerized management systems to generate and track requisitions, purchase orders, deliveries, invoices, and payments relative to the status of the budget.
- Apply knowledge of supply and fixed asset management procedures and depreciation practices.
- Apply knowledge of principles and procedures for inventory management and control.
- Demonstrate knowledge of types and benefits of quality control methods.
- Demonstrate knowledge of techniques for producing, using, and interpreting financial analysis of life cycle costs.
- Demonstrate knowledge of how to plan and implement a program for the maintenance and repair of equipment.
- Identify procedures related to the legal aspects of the disposal of surplus and outdated materials and equipment.
- Demonstrate knowledge of amortization techniques pertaining to new and replacement capital equipment.

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0008 Understand risk management procedures.

For example:

- Demonstrate knowledge of characteristics, benefits, and limitations and liabilities of common types of insurance protection, including insurance cooperatives.
- Demonstrate knowledge of insurance requirements, including claim reporting, certificate of insurance, and settlement procedures.
- Demonstrate knowledge of federal and state statutes related to liability limits and bond requirements.
- Apply knowledge of procedures for assessing potential safety hazards in school buildings and on school grounds.
- Demonstrate knowledge of techniques for and benefits of providing education on risk management issues to school district personnel.
- Demonstrate knowledge of methods and models for evaluating a school district's risk management program.
- Demonstrate knowledge of state statutes relating to subcontracting and reporting, including prevailing wage and other requirements.

SUBAREA III—SCHOOL DISTRICT OPERATIONS AND SERVICES LEADERSHIP

0009 Understand the management of information systems.

For example:

- Demonstrate knowledge of current technologies related to the security, storage, analysis, and communication of data and information.
- Evaluate the benefits of producing information in relation to the costs of producing information.
- Demonstrate knowledge of purposes and procedures for developing a records management system that complies with all legal requirements (e.g., maintaining an accurate database to facilitate management decisions, following all legal requirements for the retention and destruction of records).
- Apply knowledge of principles, techniques, and criteria for evaluating computer hardware and software for use in all aspects of the school system, including the school business office.
- Demonstrate knowledge and responsibility of legal and ethical requirements related to information disclosure (e.g., Health Insurance Portability and Accountability Act [HIPAA], Family Educational Rights and Privacy Act [FERPA], Freedom of Information Act [FOIA]).

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0010 Understand human resource management and labor relations and collective bargaining issues.

For example:

- Demonstrate knowledge of principles, procedures, legal factors, and interpersonal skills involved in recruiting, retaining, and terminating personnel.
- Demonstrate knowledge of how school board policies and state and federal employment laws influence human resource management for district personnel.
- Apply knowledge of strategies and considerations involved in purchasing, selecting, evaluating, and managing employee benefits programs for district personnel.
- Demonstrate knowledge of the legal requirements and tax consequences of employee benefits programs for district personnel.
- Apply knowledge of how to design and implement professional development programs conducive to growth and skill enhancement for district personnel, including mandated training.
- Recognize the need for district personnel to understand expectations included in board policy as well as in state and federal laws.
- Apply knowledge of board of education policies and state statutes regarding collective bargaining.
- Apply knowledge of board policy and state statutes regarding supervision and evaluation of personnel.
- Demonstrate knowledge of developing strategies for conducting collective bargaining.
- Demonstrate knowledge of procedures and considerations involved in developing salary schedules and benefits packages.
- Demonstrate knowledge of methods for collecting and analyzing the costs associated with salary and benefits proposals.

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0011 Understand procedures for real estate management and school facilities planning and construction.

For example:

- Demonstrate knowledge of legal implications for acquiring and disposing of school district property.
- Demonstrate knowledge of how to collaborate with governmental agencies regarding zoning, long-range land use, and the effect of commercial and residential development on school districts.
- Demonstrate knowledge of proper real estate management policies, procedures, and practices of school-related business.
- Identify procedures for managing the fixed assets of an educational institution.
- Apply knowledge of steps and procedures for developing a strategic plan for school facilities, including replacement schedules (e.g., roof, HVAC), population projections, and current building evaluations.
- Demonstrate knowledge of funding sources and issues related to school construction (e.g., bond ratings, rating process, bond election process, amortization of bond issues).
- Demonstrate knowledge of the process to develop a public information campaign (e.g., referendum).
- Apply knowledge of procedures for selecting and using the services of architects, engineers, risk managers, construction managers, general contractors, and other professionals.
- Demonstrate knowledge of legal and administrative responsibilities related to advertising, awarding, and managing construction and related contracts (e.g., contractor bankruptcy, builder's risk, product failure, poor workmanship).
- Demonstrate knowledge of protocols and procedures involved in the development, educational specifications, and selection of school sites.
- Apply knowledge of current research, practices, and issues related to the effects of energy, safety, and environmental factors on facility planning and construction.
- Demonstrate knowledge of the legal contexts in which school facilities are planned, constructed, and operated, including the roles of the various governmental agencies.

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0012 Understand maintenance, operations, and security procedures for school buildings.

For example:

- Demonstrate knowledge of principles and procedures for maintaining clean and safe schools for all stakeholders through custodial services and maintenance (e.g., asbestos abatement, mold and other contaminants).
- Demonstrate knowledge of skills and techniques involved in determining allocations for custodial and maintenance staffing plans.
- Demonstrate knowledge of protocols and procedures for efficient and effective energy consumption.
- Demonstrate knowledge of procedures for implementing a school district crisis management plan.

0013 Understand school transportation services, food services, and health and safety services.

For example:

- Apply knowledge of board of education policy and state statutes regarding student transportation.
- Demonstrate knowledge of effective management strategies for the maintenance and operation of a safe district transportation program.
- Demonstrate knowledge of principles and procedures for developing and implementing a food service program that meets federal and state regulations.
- Demonstrate knowledge of legal and financial implications of school food service programs.
- Demonstrate knowledge of major components of a health and life safety program in compliance (e.g., fire prevention/safety) with federal and state regulations.
- Recognize principles and techniques for developing and implementing district policies related to infectious diseases.
- Demonstrate knowledge of training procedures designed to increase awareness of potential hazards within school settings.