

Minimum Requirements for Business Manager Survey

School System/School: _____ Site Code: _____

Act 606 of the 2006 Regular Session of the Louisiana Legislature (R.S. 17:84.2) requires that each city, parish, and other local public school board shall employ a business manager or chief financial officer who shall have the qualifications established by rules promulgated by the State Board of Elementary and Secondary Education (SBESE). See attached copy of Title 28, Part XLI, Section 1301, for details regarding the minimum requirements for the Lead School Business Administrator/Chief Financial Officer (CFO) /Business Manager.

By law, the Louisiana Department of Education (LDOE) compiles, on a regular basis, a financial risk assessment of each city, parish or other local public school board. The qualification of the lead school business administrator for each School System or School is included as a factor in the financial risk assessment. LDOE is compiling data for the annual financial risk assessment and each School System or School must complete the following survey regarding the qualifications of the Lead School Business Administrator/Chief Financial Officer (CFO)/Business Manager.

Name of Lead School Finance Administrator/CFO/Business Manager: _____
Title: _____

Promotion/Hire Date of Lead School Finance Administrator/CFO/Business Manager: _____

A. Minimum Qualifications, complete all that apply: (must meet one of the following)

1. A baccalaureate degree with a minimum of 24 hours of business-related courses, such as accounting, finance, or management:
Year Obtained: _____ University Name: _____
Degree/Area of Study (i.e., B.S. in Accounting): _____
Number of Business-Related Course Hours (i.e., 6 Management, 9 Accounting): _____

2. Certified Public Accountant licensed in Louisiana: Yes No
If yes, provide LA CPA Certificate Number: _____ Current: Yes No

3. Master's degree in public or business administration:
Year Obtained: _____
Degree/ Area of Study (i.e., Masters in Public Administration): _____
University Name: _____

Additional Comments: _____

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B. Work Experience: (Business manager/CFO should have **not less than three years of work experience** in a field relevant to the duties and responsibilities of a lead school business administrator. Relevant areas shall include accounting, finance, or other areas of fiscal management.)

Attach resume or provide details of relevant experience : _____

C. Continuing Education: All business managers/CFO's must acquire **Certified Louisiana School Business Administrator (CLSBA) certification** by the Louisiana Association of School Business Officials (LASBO) within seven years of the date of hire as the business manager/CFO **and maintain certification** while employed in the position. An active Louisiana CPA license may be substituted for the CLSBA certification.

Date CLSBA Certified: _____

If not CLSBA certified, provide details regarding status of CLSBA certification: _____

Substitution: LA CPA Certificate Number: _____

D. Grandfather Clause: (A business manager/CFO employed prior to June 1, 2008, shall be exempt from meeting the minimum degree and work experience requirements and shall be allowed seven years from June 1, 2008, to complete the CLSBA certification or become a licensed CPA in the state of Louisiana)

If grandfather clause is applicable, provide details here: _____

E. Shared Services Provision: (Statute allows city, parish, or other local school boards to enter into an agreement to share business services, including the employment of a single business manager or CFO. The shared business manager or CFO must meet the minimum qualifications established by SBESE.

If shared services provision is applicable complete and return Contracted Shared Services Survey.

Submitted by: _____ Date: _____

Phone: _____ Email: _____

Email completed survey to schoolfinancehelpdesk@la.gov