



**USC**Rossier

School of Education

**School Business Management  
Certificate Program (SBMCP)**

**Developing CBO Competencies  
2022-2023**



# The Power of Partnerships

The **School Business Management Certificate Program (SBMCP)** is the focused product of a collaboration between the USC Rossier School of Education instructional design experts and its program partners—the Fiscal Crisis and Management Assistance Team (FCMAT) and School Services of California, Inc. (SSC). Leaders from these highly-regarded school business management groups serve as invaluable resources to SBMCP participants as they move through the program. These leaders provide insights into real-world scenarios and offer strategies that are relevant and applicable to today's workplace. Our third partner, the Alliance of Schools for Cooperative Insurance Programs (ASCIP), generously underwrites the honorariums issued to the program mentors.



## **Fiscal Crisis and Management Assistance Team (FCMAT)**

The mission of the Fiscal Crisis and Management Assistance Team is to help California's local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training and other related school business services. To support this mission, FCMAT supports educational programs, such as the USC Rossier's School Business Management Certificate Program, in order to prevent financial mismanagement. Not only do FCMAT experts present in the program throughout the year, but FCMAT also makes its workshops available to program participants at no additional cost.

WEB: [fcmat.org](http://fcmat.org)



## **School Services of California, Inc. (SSC)**

Whether the engagement is for information services, legislative or governmental relations, financial and business consulting, executive search, or innovative workshops and training that are designed to help in solving problems and improving student performance, SSC is the recognized expert. Their recognized strength is the quality of their expert staff who are committed and focused to ensure that all children in California get a world-class education as they become the next generation of national and world leaders. Like FCMAT, SSC provides USC Rossier's SBMCP students with access to its workshops on a complimentary basis.

WEB: [sscal.com](http://sscal.com)



## **Alliance of Schools for Cooperative Insurance Programs (ASCIP)**

ASCIP generously underwrites the honorariums issued to the mentors who work with SBMCP participants.

WEB: [ascip.org](http://ascip.org)

# Competency-Based Program for Experienced Professionals

## **The School Business Management Certificate Program**

at the University of Southern California's Rossier School of Education provides a unique opportunity for educational leaders and school business professionals to deepen their management

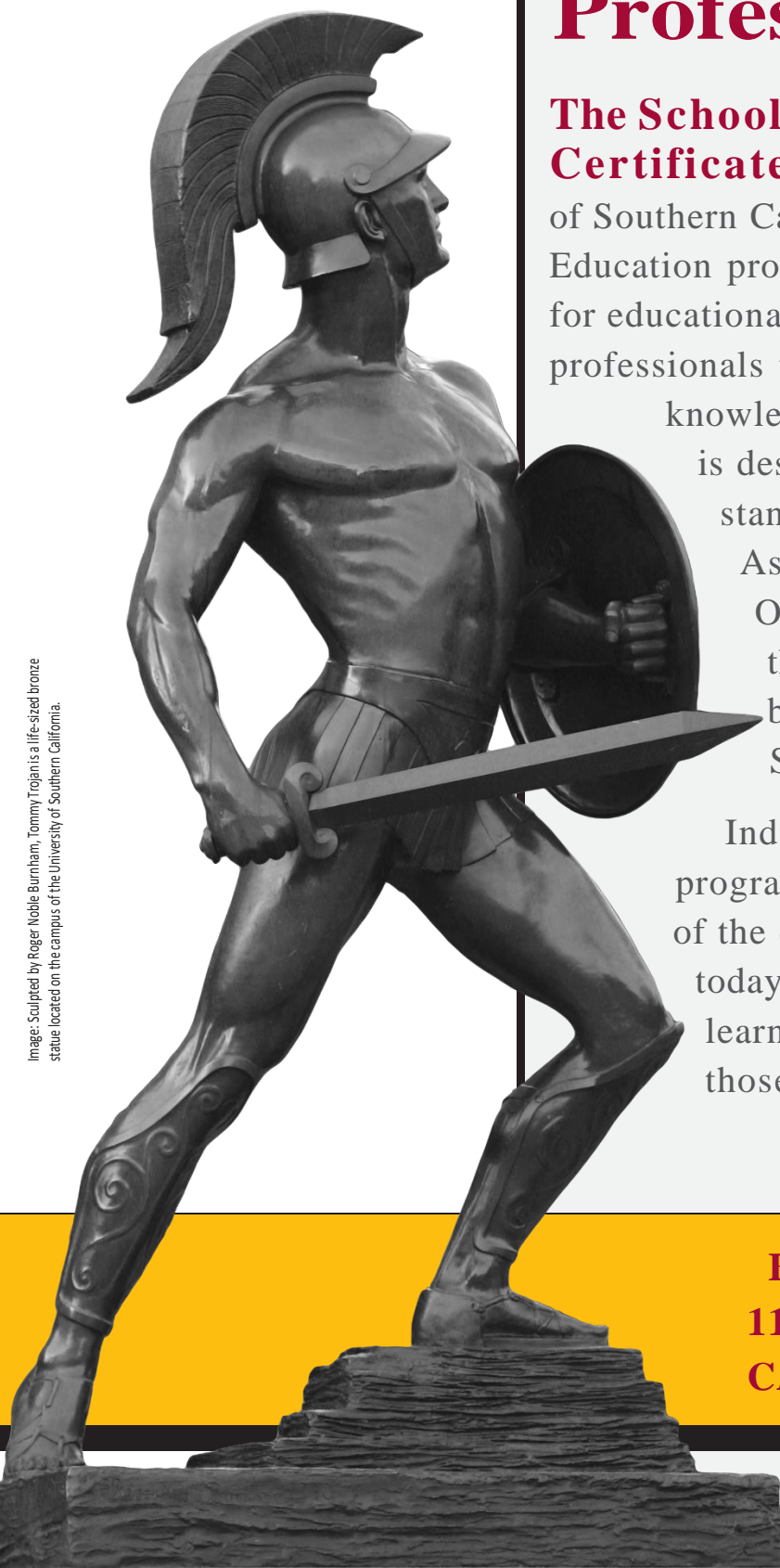
knowledge through a curriculum that is designed around the professional standards established by the

Association of School Business Officials International (ASBO) and the certification requirements set by the California Association of School Business Officials (CASBO).

Individuals who participate in this program will gain a greater understanding of the day-to-day challenges facing today's school business officials and will learn problem-solving strategies to meet those challenges.

**Become eligible through this 11-month program to apply for CASBO CBO Certification.**

Image: Sculpted by Roger Noble Burnham, Tommy Trojan is a life-sized bronze statue located on the campus of the University of Southern California.





# USC Rossier School of Education

## School Business Management Certificate Program

### Program Overview

USC Rossier's **School Business Management Certificate Program (SBMCP)** is an 11-month program that simulates a year in the life of a K-12 school district business office and provides a laboratory where participants can gain real-world skills for the workplace.

In a cohort of approximately 40 students, you will be guided by experienced practitioners through a curriculum developed around ASBO standards and CASBO CBO Certification requirements.

You will have the opportunity to apply leadership and management principles in simulations grounded in the context of today's K-12 public education.

The program curriculum recognizes the varied and complex responsibilities of the school business official and addresses topics across every aspect of education administration.

- Organization and Administration
- Public Policy and Intergovernmental Relations
- Legal Issues
- Financial Resource
- Principles of School Finance
- Budgeting and Financial Planning
- Accounting, Auditing, and Financial Reporting
- Cash Management, Investments, and Debt Management
- Technology for School Finance Operations
- Personnel and Benefits Administration
- Professional Development
- Human Relations
- Planning and Construction
- Maintenance and Operations
- Purchasing
- Real Estate Management
- Strategic Planning
- Instructional Support Program Evaluation
- Instructional Program Evaluation
- Communications
- Management Information Systems
- Ancillary Services Risk Managements
- Food Services

Upon successful completion of this program, individuals will be eligible to apply for CASBO CBO Certification.

**The purpose and focus of this program is to help participants develop the competencies identified by the ASBO as essential to leading a business operation in a K-12 school district or charter organization.**

# USC Rossier School of Education School Business Management Certificate Program



## Program Scope and Sequence

The **School Business Management Certificate Program (SBMCP)** is designed to provide a comprehensive learning experience for individuals who seek to further their understanding of school business management and/or for those who are working on a career path that could culminate with a Chief Business Official position in K-12 public education or charter schools.

Most of the core competencies to which students are exposed in the SBMCP are transferable between the various sectors of public education and jobs within the business office. The program lasts 11 months and is delivered in a blended format, using state-of-the-art technology to support the interactive online learning component that makes up 75% of the time spent.

### **BOOTCAMP - Thursday, July 28<sup>th</sup> through Saturday, July 30<sup>st</sup>, 2022**

The program begins with a 3- day Boot Camp that lays down fundamentals of school business and reinforces communication, problem solving, and leadership skills. Boot Camp is the foundation for the rest of program where students will build and expand their professional networks –beginning with their classmates, extending to the SBMCP’s professional staff, and finally encompassing an important group of field experts who help support instruction. Campus housing is provided for the Boot Camp. Staying overnight in the campus housing is not mandatory, but is highly recommended as the after-class assignments can take several hours to complete.

### **ONLINE SESSIONS: Quarters 1 and 2 (August–December)**

Immediately following the conclusion of Boot Camp, participants begin the online portion of the program. Online sessions are synchronous and are required; group work and individual assignments. For group work, an interactive, online meeting space is provided. Live sessions are held on most Mondays from 6:00 to 7:30 P.M. These interactive sessions feature experts in school business management. These live sessions are recorded and can be viewed at your convenience.

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# USC Rossier School of Education School Business Management Certificate Program



## **MID-YEAR MEETING (Mid-January, 2023)**

This 2-day session is held in online and coincides with the School Services of California, Inc. (SSC) workshop. The SSC generously provides our cohort with complimentary registration to its half-day workshop where the governor's budget is explained to school business leaders from across the state. After the workshop, participants work with the instructional team to prepare for their SBMCP capstone projects. These efforts focus on organizing the project timeline; documenting the project outcomes for written submission; and learning presentation skills that will be used for the oral presentation of the project summary.

## **ONLINE SESSIONS: Quarters 3 and 4 (January–June)**

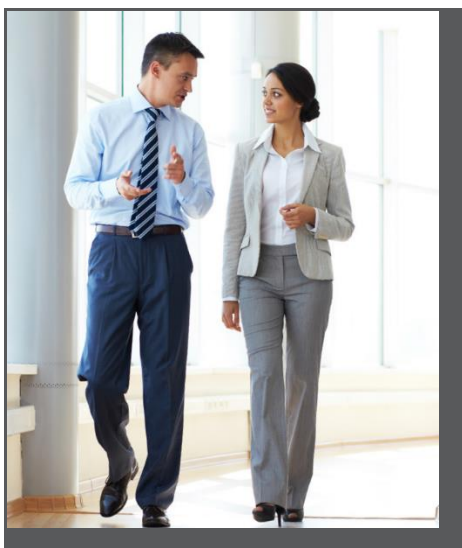
Participants continue to move through the competency-based curriculum that generally aligns with an actual school business calendar. In addition to building skills through real-world simulations, participants also begin to work on their capstone projects.

## **LEADERSHIP CAPSTONE SESSION (June 15-17, 2023)**

The SBMCP program concludes with a 2 1/2-day residential session designed for program participants to showcase their capstone project. Significant time is also dedicated to two workshops: "How to Put Your Best Foot Forward When Applying for a Position" and "How to Shine through the Interview Process." All aspects of the capstone experience are observed, reviewed, and assessed by staff, and constructive feedback is provided by the state's top school business leaders. There is an awards reception on Friday evening for participants, their mentors, and the instructional team. The official Culmination Ceremony, where the certificate of completion is awarded, is held on Saturday morning. Family and friends are welcome to attend the Culmination Ceremony. Hotel accommodations are the responsibility of the participant. USC does, however, provide discounted rates for students.

# USC Rossier School of Education

## School Business Management Certificate Program



### Lead Instructional Team

**Joel Montero**, Faculty Director

*Chief Executive Officer, FCMAT (Retired)*

**Michael Bishop**, Mentor Liaison

*Business Services Consultant and Former CBO for Santa Ana Unified, Paramount Unified and Compton Unified*

**Lynn David**, Facilitator

*Assistant Superintendent of Business Services, Moorpark Unified School District*

**Tami Montero**, Facilitator

*Intervention Specialist, FCMAT*

**Andrea Dodson**, Facilitator

*Intervention Specialist, FCMAT*

**Pearl Iizuka**, Facilitator

*Business Services Consultant and Former CBO for Palos Verdes Unified School District*

**Marcus Wirowek**, Facilitator

*Intervention Specialist, FCMAT*

### Small Learning Support Groups

Each student is part of a Small Learning Support Group of 6-8 students and is assigned to one of our program facilitators. During the program, this facilitator is generally your first point of contact when requesting assistance.



### Mentors

Since the program uses fictitious scenarios to immerse students in a simulated learning experience, each student is also asked to select a mentor from their real-world workplace who can help them translate the learning to application. The ideal mentor is a person who is or has been a chief business officer in a K-12 setting. The mentors will be contacted several times throughout the year by the program's Mentor Liaison who will articulate the workload and big picture goals. The mentor/mentee relationship is one of mutual contact. This means the mentee should be able to reach out for support when needed and the mentor should check in regularly.



# USC Rossier School of Education

## School Business Management Certificate Program

### Special Guest Presenters

Starting with Boot Camp and continuing throughout each phase of the program, top experts from California will share their expertise on a host of school business management topics. These experts include:

**Carolynne Beno**

*Intervention Specialist  
FCMAT*

**Stephanie Bruce**

*Director Nutrition Services  
Palm Springs Unified School District*

**Danyel Connolly**

*Director Management Consulting Services  
School Services of California*

**Tom DeLapp**

*Communications Expert  
Communication Resources for Schools*

**Mike Fine**

*CEO  
FCMAT*

**Steven Gald**

*Vice President, Public Finance  
California Financial Services*

**Brianna Garcia**

*Vice President  
School Services of California*

**Michelle Giacomini**

*Deputy Executive Officer  
FCMAT*

**Gita Govahi**

*Assistant Dean  
USC Marshall School of Business*

**John Gray**

*President  
School Services of California*

**Laura Haywood**

*Technical Writer  
FCMAT*

**Patti Herrera**

*Vice President  
School Services of California*

**Caroline Larson**

*Partner  
Vavrinek, Trine Day & Co., LLP*

**Leonel Martinez**

*Technical Writer  
FCMAT*

**Molly McGee-Hewitt**

*CEO  
McGee-Hewitt, LLC.*

**Matt Phillips**

*Director, Management Consulting Services  
School Services of California, Inc.*

**Suzanne Speck**

*Vice President  
School Services of California, Inc.*

**Don Zimring**

*Retired Superintendent  
Las Virgenes Unified School District*

# USC Rossier School of Education

## School Business Management Certificate Program

### How to Apply

Admission to the **School Business Management Certificate Program** opens in February with updated tuition costs. You are encouraged to apply as early as possible. ***\*Please note that the tuition reflected is for the current 2022-2023 year. Thank you\****

#### THE APPLICATION PROCESS

- Open an account in the USC Rossier Professional Development Application website to upload your documents. **There is a non-refundable fee of \$25 to open this account**
- Complete the online application and upload .pdf versions of:
  - Two letters of recommendation from someone who can speak to your professional experience
  - Your current resume

**After your application documents are received**, you will be scheduled for a 30-minute phone meeting with two members of the program's instructional team to discuss program expectations in terms of workload, method of doing assignments, online meeting time, and to ensure that the program is in alignment with your career goals.

Within 48 hours of the meeting, you will be notified if you are approved to register.

**After you are approved to register**, you will be sent a hyperlink to the online registration website. You will need to complete your registration to guarantee your spot in the cohort within one week.

At this time, you will also be asked to identify someone in your professional life who will serve as your mentor while you are in the program. The mentor's role is to help you synthesize the program lessons and apply them to your daily workplace.

### Tuition

Tuition is due at the time of registration. The fee for the program is \$7,200.00. This includes your on-campus housing and meals during Boot Camp as well as access to all online materials, including access to all SSC workshops throughout the school year you are enrolled. You will also have access to all of USC's resources within the entire library database for all of your research purposes. As a reminder, hotel accommodations are the responsibility of the participant for in-person events. USC does, however, provide discounted rates for students. There is a low-cost loan option available with USC's Credit Union to cover tuition. [https://www.usccreditunion.org/rate\\_groups/certificate-program-loan/](https://www.usccreditunion.org/rate_groups/certificate-program-loan/)

