Kentucky Board of Education

Kentucky Department of Education

702 KAR 3:320. Finance officer certification requirements

December 2014

PROVISIONAL CERTIFICATION APPLICATION
KENTUCKY FINANCE OFFICER CERTIFICATION PROGRAM

Applicant Name _____

Address _____

_____

Telephone _____

For Official Use Only

Date received _____

Certificate Number Issued _____

Mentor Assigned or Date Grandfather Status Recognized _____

Employing school district _____

Address _____

_____

Telephone _____

Contact person _____

Degree(s) Obtained

Degree _____

Institution _____

Degree _____

Institution _____

Degree _____

Institution _____

Has the applicant completed at least twelve (12) credit hours in accounting coursework from an accredited postsecondary institution?

Yes ☐ *Attach transcript(s)*

No ☐

List work experience which was primarily in accounting or finance.

Employer _____

Dates of employment From _____ To _____

Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

CHECK ONE:

☐ This application also serves as my application to the Kentucky Finance Officers Internship Program (KFIP)

☐ This application serves as my request for grandfather status

Signatures

Applicant _____ Date _____

Superintendent of employing district _____ Date _____

FULL CERTIFICATION APPLICATION
KENTUCKY FINANCE OFFICER CERTIFICATION PROGRAM

Applicant Name _____

Address _____

_____

Telephone _____

Employing school district _____

Address _____

_____

Telephone _____

Contact person _____

For Official Use Only

Date received _____

Certificate Number Issued _____

Provisional certificate number _____

Date issued _____

Date of successful completion of Kentucky Finance Officer Internship Program _____
(attach KFIP Assessment Committee Final Report)

Has the applicant obtained fifteen (15) hours of school finance training by a provider approved by KDE for this purpose?

Yes ☐ *attach documentation*

No ☐

Has the applicant obtained twelve (12) hours of MUNIS training offered by a provider approved by KDE for this purpose?

Yes ☐ *attach documentation*

No ☐

Signatures:

Applicant _____ Date _____

Superintendent of employing district _____ Date _____

INTERN PROGRESS REPORT
KENTUCKY FINANCE OFFICER INTERNSHIP PROGRAM

Intern Name _____

Mentor Name _____

Date Internship Began _____

Curriculum Area

Quarter: _____

	ND	PD	D	N/A
Audit	☐	☐	☐	☐

Comments:

Budgets	☐	☐	☐	☐

Comments:

Cash Management	☐	☐	☐	☐

Comments:

Construction	☐	☐	☐	☐

Comments:

Financial Statements ☐ ☐ ☐ ☐

Comments:

Funding ☐ ☐ ☐ ☐

Comments:

Internal Controls ☐ ☐ ☐ ☐

Comments:

Purchasing ☐ ☐ ☐ ☐

Comments:

Signatures

Mentor _____ Date _____

Intern _____ Date _____

FOCP-3
Effective 7-1-15

Key: ND - not demonstrated; PD - partially demonstrated; D - demonstrated; N/A - not applicable for the period.

ASSESSMENT COMMITTEE REPORT
KENTUCKY FINANCE OFFICER INTERNSHIP PROGRAM

Intern Name _____

Date Internship Began _____

Mentor Name _____

Superintendent or Designee _____

KDE Representative _____

☐ First Half

☐ Second Half

Curriculum Area

	ND	PD	D	N/A
Audit	☐	☐	☐	☐

Comments:

Budgets	☐	☐	☐	☐

Comments:

Cash Management	☐	☐	☐	☐

Comments:

Construction

Comments:

Financial Statements

Comments:

Funding

Comments:

Internal Controls

Comments:

Purchasing

Comments:

The result of the KFIP internship: (applicable only for the second half report)

- ☐ Successful completion
- ☐ Portion(s) to be repeated: _____
- ☐ Entire internship to be repeated

Signatures

Mentor	_____	Date _____
Superintendent or Designee	_____	Date _____
KDE Representative	_____	Date _____
Intern	_____	Date _____

Key: ND - not demonstrated; PD - partially demonstrated; D - demonstrated; N/A - not applicable in this period

MENTOR APPLICATION
KENTUCKY FINANCE OFFICER INTERNSHIP PROGRAM

For Official Use Only	
Date received	_____
Interview Date	_____

Applicant Name _____

Address _____

_____

Telephone _____

Employing school district _____

Address _____

_____

Telephone _____

Has the applicant obtained full certification under the Kentucky Finance Officer Certification Program?

Yes ☐ Certificate Number _____ Date Issued _____

No ☐

If the applicant answered "No" above, has the applicant been employed as a Kentucky finance officer prior to July 1, 2015?

Yes ☐ Date of initial employment as a KY finance officer _____

No ☐

Degree(s) Obtained

Degree _____

Institution _____

Degree _____

Institution _____

Degree _____

Institution _____

List work experience which was primarily in accounting or finance.

Employer _____

Dates of employment From _____ To _____

Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

Employer _____

Dates of employment From _____ To _____
Description of relevant experience:

☐ I understand that an interview and successful completion of KDE Mentor Training is required to become a KFIP mentor.

Signatures

Applicant _____ Date _____

Superintendent of employing district _____ Date _____

FINANCE OFFICER CURRICULUM
KENTUCKY FINANCE OFFICER INTERNSHIP PROGRAM

Audit
- Internal
- Annual independent audit

Budgets
- Tentative
- Working
- Budget amendments
- Budget projections

Cash Management
- Investments
- Cash flow projections
- Reconciliations

Construction
- Funding, including bond issuances
- Tracking

Financial Statements
- Unaudited AFR, balance sheet
- Entity-wide statements, management's discussion & analysis, notes
- Monthly Reporting

Funding
- SEEK
- Taxes
- Grants

Internal Controls
- Assets
- Expenditures
- Financial management system, including roles and security

Purchasing
- Model procurement
- Bid law
- Cooperative purchasing