

**CERTIFICATION PROGRAM OF THE NORTH CAROLINA
LOCAL GOVERNMENT BUDGET ASSOCIATION**

Purpose

The voluntary certification program is designed to enhance the local government budget and evaluation profession in North Carolina. Its purpose is to recognize individual achievement for an established level of knowledge on the topics of budgeting, performance, and evaluation. Individuals who meet the certification's standards of professional experience, courses, and exams are designated as Certified Budget & Evaluation Officers by the North Carolina Local Government Budget Association (NCLGBA). An important aspect of this endeavor is that the certification program is consistent with the goals of the NCLGBA, which are as follows:

To strengthen communications and provide opportunities for professional growth and development through the exchange of ideas;

To investigate, study, discuss, and recommend improvements in the application of budget and evaluation methods;

To collect, compile, and distribute pertinent information about the administration of budget responsibilities; and

To promote, sponsor, or conduct training and education programs through the participation in association sponsored events and meetings.

Certification Board

The NCLGBA board of directors will serve as the certification board for the first fiscal year (beginning September 1, 2008 and ending August 31, 2009), making all administrative decisions regarding the certification program. After that time, the board of directors will either appoint a certification board to administer the certification program or continue in the existing capacity.

NCLGBA Membership

Individuals must be a member of the NCLGBA and the NCLGBA's listserv. The listserv is used to provide information on the certification program and to track continuing professional education (CPE) credits required for certification renewal.

**CERTIFICATION'S STANDARDS:
PROFESSIONAL EXPERIENCE, COURSES, AND EXAMS**

Professional Experience

Individuals with eight or more years of professional experience in local government budget and evaluation are eligible for the certification. Professional experience is serving as an organization's budget officer as defined by G.S. 159-9 or possessing significant administrative responsibilities in one or more of the fundamental areas of budget and evaluation, including the development, implementation, and evaluation of the annual operating budget, the capital improvement program, and the performance measurement system. Common positions that have these responsibilities include managers, administrators, budget directors, and management, finance, and budget analysts. Department heads, division managers, and support analysts with significant budget and evaluation responsibility also are eligible for certification program. Out-of-state experience may be counted toward the required number of years.

Individuals with an associate’s degree from a two-year accredited community college are eligible for certification with seven or more years of professional experience in local government budget and evaluation.

Individuals with a bachelor’s degree from a four-year accredited college or university are eligible for certification with five or more years of professional experience in local government budget and evaluation.

Individuals with a master’s degree in public administration, business administration, or related field are eligible for certification with three or more years of professional experience in local government budget and evaluation.¹

Courses

Ten days of course work are required to become eligible for certification.² The ten course days are comprised of the following four categories: four days on operating budget, four days on capital budgeting, one day on performance measurement, and one day on evaluation. Individuals may take the courses in any order; however, the course must be completed before taking the respective exam. The following tables contain the approved courses by category (note that some courses offer more training days than required):

4 Days on Local Government Operating Budget		
Organization	Course	Days
School of Government	Budgeting and Financial Planning, Part I: Annual Budget Preparation and Enactment	4

4 Days on Local Government Capital Budget		
Organization	Course	Days
School of Government	Budgeting and Financial Planning, Part II: Capital Planning and Finance	4

1 Day on Performance Measurement*		
Organization	Course	Days
School of Government	Performance Measurement in Local Government	1
Government Finance Officers Association	Introduction to Performance Measurement	2
Government Finance Officers Association	Advanced Performance Measurement	2

*Other courses may satisfy this requirement as approved by the certification board.

¹ The primary criterion for related field is the relationship between the degree and the field of work. For example, a master’s in social work or public health would be appropriate for an individual working in the area of health and human services.

² Individuals who have completed the required course are grandfathered and are eligible to take the respective exam.

1 Day on Evaluation*		
Organization	Course	Days
School of Government	Introduction to Program Evaluation for Budget and Management Analysts	1
School of Government	Practical Analytic Techniques for Local Government	1
Government Finance Officers Association	Budget Analysts Training Academy	3.5
Government Finance Officers Association	Costing and Competitive Options for Government Services	2

*Other courses may satisfy this requirement as approved by the certification board.

Exams

Three exams must be successfully completed to become eligible for certification. Exams will be offered twice a year in conjunction with the NCLGBA annual conferences. The cost of each exam is determined by the certification board and paid as part of the registration process of each annual conference; however, individuals are not required to register for the conference.³

One exam is based on the materials covered in the four days on the local government operating budget. The exam may be taken any time after the completion of the course. It will contain no more than 40 true/false and multiple choice questions. An individual must successfully answer 80 percent or more of the questions to pass, or the exam must be retaken. There is no limit on the number of times an individual may retake the exam.

One exam is based on the materials covered in the four days on the local government capital budget. The exam may be taken any time after the completion of the course. It will contain no more than 40 true/false and multiple choice questions. An individual must successfully answer 80 percent or more of the questions to pass, or the exam must be retaken. There is no limit on the number of times an individual may retake the exam.

One exam is based on the material covered in the one day on performance measurement. The exam may be taken any time after the completion of the courses. It will contain no more than 20 true/false and multiple choice questions. An individual must successfully answer 80 percent or more of the questions to pass, or the exam must be retaken. There is no limit on the number of times an individual may retake the exam.⁴

³ The exam fee is revenue for the NCLGBA, which helps cover the cost for the exam room at the conference facility. Making the exam fee part of the NCLGBA registration process, whether the individual registers for the conference or not, also reduces the administrative burden associated with the certification program.

⁴ The exam on performance measurement will not include questions from the required one day on evaluation. This is because of the wide-variety of approaches currently used to teach evaluation. However, the subject matter is important enough to warrant one-day of required training.

CERTIFICATION APPLICATION, CONTINUING EDUCATION, AND EXCEPTIONS

Certification Application

Once an individual meets the certification requirements of professional experience, courses, and exams, he or she completes the certification application form (appendix A) and submits it to the certification board for review and approval.⁵ The board's responsibility is to validate the individual's eligibility and to notify the individual that he or she is now qualified to practice as a Certified Budget & Evaluation Officer. The individual also will receive a certification certificate. If the individual is denied acceptance, the board must provide, in writing, the reason for denial and how the individual can overcome the deficiency.

Continuing Education

Each Certified Budget & Evaluation Officer is committed to completing 25 hours of continuing professional education (CPE) ever four years for certification renewal. One approach to meeting this requirement is to attend at least two conferences of the NCLGBA every four years. Individuals also may receive CPE credit from taking additional coursework or from attending other professional conferences, including state conferences like the North Carolina City/County Management Seminar and national conferences like the Government Finance Officers Association. The School of Government will track CPE credit on an annual basis by distributing a request for hours over the budget listserv.

Exceptions

Individuals who have exceptions with the certification program must file a written statement of the exception with the certification board. Exceptions could address professional experience or courses taken from other organizations for example. The board's decision on these matters, after reviewing all appropriate information, is final.

FREQUENTLY ASKED QUESTIONS

Do I have to complete my professional experience requirements before taking the courses and respective exams? No, in fact, you are encouraged to complete the coursework and exams while you are obtaining the necessary years of experience.

If I have already taken a required course, can I sit for the exam? Yes, individuals who have completed the required courses are grandfathered and are eligible to take the respective exam.

Why is there no exam associated with the one course day on evaluation? While evaluation is important enough to warrant professional exposure through coursework, the wide-variety of approaches used to teach evaluation makes it difficult to administer a test at this time.

What happens if I don't complete the 25 hours of continuing professional education every four years? An individual must complete the certification program again or petition the certification board for reinstatement if a valid reason can be substantiated.

⁵ The certification application form is emailed to William Rivenbark (rivenbark@unc.edu) at the School of Government after all certification requirements are met, who submits it to the certification board for approval at its next scheduled meeting. The certification board meets at least twice a year.

**APPENDIX A
NORTH CAROLINA LOCAL GOVERNMENT BUDGET ASSOCIATION (NCLGBA)
CERTIFICATION APPLICATION FORM**

Full Name	Title
Organization	Address
City	State and Zip Code
Phone	Email

Are you a member of the NCLGBA? Yes No

Are you a member of the NCLGBA's Listserv? Yes No

Professional Experience*

Organization	Title (current position)	Start and End Dates
Organization	Title	Start and End Dates
Organization	Title	Start and End Dates
Organization	Title	Start and End Dates

***Add more rows if needed.**

Education

Institution	Degree
Institution	Degree
Institution	Degree

Courses

Requirement	Course Title	Date
4 Days on Local Government Operating Budget	Budgeting and Financial Planning, Part I: Annual Budget Preparation and Enactment	
4 Days on Local Government Capital Budget	Budgeting and Financial Planning, Part I: Capital Planning and Finance	
1 Day on Performance Measurement		
1 Day on Evaluation		

Exams

Exam	Date Taken	Score
4 Days on Local Government Operating Budget		
4 Days on Local Government Capital Budget		
1 Day on Performance Measurement		

Signature

Date