

## CERTIFIED STATE BUDGET PROFESSIONAL PROGRAM

### INTRODUCTION

The North Carolina Office of State Budget and Management (OSBM) is working with an Advisory Board of state CFOs, Budget Directors, and others to create a certification for state budget professionals.

OSBM identified training and career advancement opportunities for state budget professionals as key to enhancing the work product of budget professionals statewide and increasing retention rates among state budget professionals.

The state budget professional certification Advisory Board met for a series of meetings in the Spring and Summer of 2022 to identify specific skills and knowledge that should be developed during a certification process. The result of these discussions is this application.

The application seeks proposals for delivery of an in-person and/or online curriculum that will provide current and aspiring budget professionals the foundational skills and knowledge necessary to succeed as a state budget professional.

Foundational skills and knowledge identified by the Advisory Board include:

- State Budget Administration and Law for Operating Budgets
- State Budget Administration and Law for Capital Budgets
- Budget Strategy and Analytical Thinking (Including Revenue and Expenditure Analysis)
- Communicating about the Budget
- Data Analytics
- Performance Management, Program Evaluation, and Strategic Planning
- Accounting for Budget Professionals
- Purchasing and Contracting, including Performance Contracting

The questions in this application are designed to provide your institution an opportunity to outline current courses being offered that relate to the aforementioned skills and knowledge and discuss how you would partner with the State to develop new courses in these areas. The questions are broad and open-ended in nature so that your institution may have the flexibility to describe a program that provides a strong learning opportunity for students and is economically sustainable for your institution.

Similar programs in [Georgia](#) and at the [local level in North Carolina](#) take, on average, two-years to complete and conclude with a series of exams that must be passed for certification. Proposals do not necessarily need to be consistent with these examples, but the examples may serve as helpful reference points.

Through the application, the Advisory Board would also like to encourage collaboration between four-year colleges/universities and community colleges to leverage expertise at North Carolina's many institutions of higher education. OSBM will host a networking event shortly after release of the application for any interested potential providers. This will be an opportunity for OSBM to share about information and for potential providers to identify possible opportunities for collaboration.

The tentative program timeline would allow for the first courses to be offered in Fall 2023 with courses being added until the full list of course offerings is available in Fall 2025.

**CERTIFIED STATE BUDGET PROFESSIONAL PROGRAM  
APPLICATION**

<b>Institution:</b>	
<b>Contact Name:</b>	
<b>Phone Number:</b>	
<b>Email Address:</b>	

**QUESTIONS**

***Institution Profile and Capacity***

1. Please describe continuing education/certification programs that your institution manages that demonstrates your institution's capacity to deliver curriculum for an audience of professional practitioners.
2. Do you currently offer undergraduate, graduate, or continuing education courses related to the following? If so, please describe the course.
  - State Budget Administration and Law for Operating Budgets
  - State Budget Administration and Law for Capital Budgets
  - Budget Strategy and Analytical Thinking (Including Revenue and Expenditure Analysis)
  - Communicating about the Budget
  - Data Analytics
  - Performance Management, Program Evaluation, and Strategic Planning
  - Accounting for Budget Professionals
  - Purchasing and Contracting, including Performance Contracting
3. Identify staff and background for the courses they plan to teach.

***Program Initiation/Start-Up***

1. Please describe how the start-up process worked for existing certification/continuing education programs within your institution.
2. When would you be able to offer the first course(s)? When do you expect to be able to offer the full slate of courses?
3. For your institution, what number of students and what cost per student would be required for this to be an economically viable endeavor? What other criteria would your institution use to evaluate the viability of a course?
4. How would you plan to bring people into the program and recruit new students? Would you envision these courses being available to individuals not currently employed by the state?
5. How would you utilize the state resources around you and other North Carolina Universities/Colleges to create this program? How would you leverage these relationships to create a comprehensive program?

***Program Implementation***

1. Below are some initial thoughts and possible approaches on this program. What would you change to fit into your plan?

- a. A multi-year program, taking no more than 2-3 years to complete
- b. Courses would be a week in length
- c. Examination after each course, with issuance of certification upon completion of all courses
- d. Goal is to matriculate a minimum of 20 people through the program a year
- e. No expectations about sequence of courses, other than a course covering state budget administration and law coming first
- f. Plan to work once a year with the advisory board and college/university partner to compare the curriculum to current state needs

***Program Maintenance***

1. How would you plan to incorporate legal practices at the state level and incorporate statutes to keep courses up to date with changing legislation?
2. What would you need to help you/your institution succeed at carrying out this effort? Are there any challenges you anticipate in providing these courses?
3. If your institution were selected to do this, how long would your institution be able to commit to this effort? Would the institution commit to one full cycle of the program or multiple cycles?
4. Do you have any final comments about why you are interested in offering these courses to fulfill the certification program requirements?

**Applicants may respond to these questions in a separate document and submit with this application cover sheet.**

**Deadline to Apply: February 28, 2023**

**Please submit completed application and any questions to:**

**[OSBM-CBP-Program@osbm.nc.gov](mailto:OSBM-CBP-Program@osbm.nc.gov)**

**CERTIFIED STATE BUDGET PROFESSIONAL PROGRAM  
APPLICATION RUBRIC**

*Applicant does not need to complete; to be completed by Advisory Board Scoring Subcommittee*

<b>Institution:</b>	
<b>Contact Name:</b>	
<b>Phone Number:</b>	
<b>Email Address:</b>	

**Institution Profile and Capacity**

	1 - Very Weak	2	3 - Adequate	4	5 - Exceptional	Notes
Demonstrated success of existing programs						
Course offerings align with foundational skills and knowledge						
Staff availability matches preferred timeline						
Staff background fits with courses listed						

**SECTION TOTAL: \_\_\_\_\_/20**

**Program Initiation/Start-Up**

	1 - Very Weak	2	3 - Adequate	4	5 - Exceptional	Notes
Timeline befitting outlined goals						
Utilization of state resources including intergovernmental partnerships						
Recruitment strategies						
Cost per student						

**SECTION TOTAL: \_\_\_\_\_/20**

**Program Implementation**

	<b>1 - Very Weak</b>	<b>2</b>	<b>3 - Adequate</b>	<b>4</b>	<b>5 - Exceptional</b>	<b>Notes</b>
Supports implementation plan with evidence						
Estimate matriculating students meets minimum of 20						
Incorporates the Advisory Board						
Expectations for students are in-line with outlined plans						

**SECTION TOTAL: \_\_\_\_\_/20**

**Program Maintenance**

	<b>1 - Very Weak</b>	<b>2</b>	<b>3 - Adequate</b>	<b>4</b>	<b>5 - Exceptional</b>	<b>Notes</b>
Plan to maintain updated curriculum related to budget law						
Sufficient commitment from the Institution(s)						
Long-term planning has occurred						
Feasible plan for keeping up the program						

**SECTION TOTAL: \_\_\_\_\_/20**

**GRAND TOTAL: \_\_\_\_\_/80**

**< or equal to 49**

- Institution does not demonstrate capacity to offer programing on scale necessary for certification program
- Institution does not demonstrate capacity to deliver courses covering foundational skills and knowledge
- Institution will not be able to meet preferred implementation timeline
- Institution will not be able to offer course series within \$2K per student target cost
- Institution does not demonstrate plan for collaborating with other state institutions to leverage resources across the state

**50-59**

- Institution does demonstrate some capacity to offer programing on scale necessary for certification program
- Institution does demonstrate some capacity to deliver courses covering foundational skills and knowledge
- Institution may or may not be able to meet preferred implementation timeline
- Institution may or may not be able to offer course series within \$2K per student target cost
- Institution may or may not demonstrate plan for collaborating with other state institutions to leverage resources across the state

**60-69**

- Institution does demonstrate capacity to offer programing on scale necessary for certification program
- Institution does demonstrate capacity to deliver courses covering foundational skills and knowledge
- Institution will be able to meet preferred implementation timeline
- Institution will be able to offer course series within \$2K per student target cost
- Institution may or may not demonstrate plan for collaborating with other state institutions to leverage resources across the state

**70-80**

- Institution does demonstrate exceptional capacity to offer programing on scale necessary for certification program
- Institution does demonstrate exceptional capacity to deliver courses covering foundational skills and knowledge
- Institution will be able to meet preferred implementation timeline
- Institution will be able to offer course series within \$2K per student target cost
- Institution demonstrates an exceptional plan for collaborating with other state institutions to leverage resources across the state