Minimum Requirements for Business Manager Survey

School District/School Name: _____

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 (CF0) /Business Manager.

By law, the State Department of Education 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 local education agency (LEA) is included as a factor in the financial risk assessment. The Department is compiling data for the Financial Risk Assessment and each LEA must complete the following survey regarding the qualifications of the Lead School Business Administrator/Chief Financial Officer (CF0)/Business Manager.

Name and Title of Lead School Administrator/CFO/Business Manager: Kevin A. Cox, CPA

Promotion/Hire Date of Lead School Administrator/CFO/Business Manager: 10/20/2015

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

1. College Degree:

Year Obtained: 1996 University Name: University of Louisiana

Degree/Area of Study (i.e., B.S. in Accounting): B.S. Economics / Accounting

Number of Business-Related Course Hours (i.e., 6 Management, 9 Accounting): 24 Accounting hours, 9 Management hours, 18 Economics hours, 9 finance hours, 6 business law

2. Certified Public Accountant licensed in Louisiana: ☑ Yes ☐ No

If yes, provide LA CPA Certificate Number: CPA0027636

3. Master's degree in public or business administration:

Year Obtained: NA

Degree/ Area of Study (i.e., Masters in Public Administration): _____

University Name: _____

Additional Comments: Additional accounting courses from the University of New Orleans

Minimum Requirements for Business Manager Survey

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 : _____

See Attached

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 (LASB0) 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: NA

If not CLSBA certified, provide details regarding status of CLSBA certification: current CPA licence

Substitution: LA CPA Certificate Number: CPA0027636

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, provide details here:

I am employed by 4th Sector Solutions, an independant contractor that provides financial, operations and human resource support for multiple charter schools in Louisiana.

Submitted by: Kevin A. Cox Phone: 225-397-0502 Email: kcox@4thsectorsolutions.com

Email completed survey to kristen.smith2@la.gov

Kevin A. Cox, CPA

Certified Public Accountant

Slidell, LA
kcox@4thsecorsolutions.com - 225.397.0502

WORK EXPERIENCE

Director of Charter School Finance

4th Sector Solutions Inc - New Orleans, LA - October 2015 to Present

Responsibilities
• Create and manage client budgets.
• Create monthly financial reports.
• Present financial reports at Finance Committee and Board of Director meetings.
• Create multi-year budget models for new school approvals.
• Manage the payroll and accounts payable process.
• Prepare and submit periodic grant drawdown requests.
• Prepare accounting and financial information for annual audit.

Certified Public Accountant

Dyer and Company, CPAs - Slidell, LA - 2012 to Oct 2015

Tax Accounting using Prosystems and Lacerte software.
* Payroll / Bookkeeping using Creative Solutions and QuickBooks.
* Financial Statement Preparation
* Business Development

Senior Accountant

Frentz Dyer and Associates, CPAs - Covington, LA - December 2008 to May 2012

Tax Preparation of Individual, Partnership, S-Corp and Corporation Tax Returns.
* Multi-State Apportionment and Accruals.
* Non-Profit and Fiduciary Tax Returns.
* General Ledger Review and Financial Statement Preparation
* Client Relations