

Yay!! I'm Certified!! Now What?

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In my previous post, [Are You Certifiable?](#), I reviewed the North Carolina Finance Officers' Certification program, sponsored by the North Carolina Government Finance Officers Association ([NCGFOA](#)). As was probably clear in the post, the process is challenging but certainly doable, and those that become certified finance officers in North Carolina should definitely be proud of their achievement. But after the months (or years) of classes, studying, and testing, what happens after the success? Is the certification permanent (just like an appointment on the [United States Supreme Court](#))? Does it expire? DO I HAVE TO TAKE THE TESTS AGAIN?? This blogpost will summarize the "post-certification" years and how certified finance officers must continue maintaining the high standards that got you where you are in the first place.

Getting the Results

As a quick review, once one passes all four exams and has completed all educational and work experience requirements, they are eligible to *apply* for certification. The certification itself is not “automatic”, though admittedly at this point, the application serves as a final “checks and balances” to ensure that all requirements have been met. Otherwise, the actual certification is relatively assured. With the final successful results letter, the individual will receive an application for certification. It is to be completed and remitted as instructed on the form. The form is then returned to the [UNC School of Government](#) for processing, along with a check for \$50, made payable to the North Carolina Finance Officers Certification Program.

Once the application is approved, the individual will be considered certified **as of the following January 1st**. Certification is for a five-year period which begins on the January 1st following the successful completion of the certification and approval process. The certification expires on December 31st of the fifth year.

While the term for certification begins on January 1st, new certifications (as well as renewals, but that will be discussed later) are recognized publicly at the NCGFOA Spring Conference, typically held in early March. Thus, the actual certificates themselves will be available a few months after the actual certification period begins.

The Certification Period

As has been noted numerous times (and yet the question will still be raised!), a certification period lasts for five years. Thus, individuals have to renew their certification at the end of each five-year period, assuming they have met and continue to meet all the necessary requirements. Be assured, however, the renewal does NOT involve testing (there is still some humanity left in the world!).

To be eligible to successfully renew one's certification, the following requirements must be met:

- The individual must continue to be employed in an eligible position (see [Are You Certifiable?](#)).
- The individual should be a [member of the NCGFOA](#).
- The individual must have accumulated at least 100 hours of professional training during the five-year certification period just ended.

These requirements are relatively self-explanatory (or at least they should be). However, the third requirement listed above, related to the professional training requirement, does raise questions, so let's explore that a bit further.

Professional Training Requirements

During the certification period, one is expected to continue to remain up-to-date about the governmental finance profession by attending and/or taking relevant live and self-study courses, conferences, webinars, etc. that are available from many different venues, such as, but certainly not limited to:

- [UNC School of Government courses](#)
- [NCGFOA](#) conferences
- [North Carolina Local Government Investment Association](#) conferences
- [North Carolina Association of Certified Public Accountants](#) courses and events
- [Government Finance Officers Association](#) courses and events
- [American Institute of Certified Public Accountants](#) resources

Certainly, taking relevant courses during the certification period in community colleges, undergraduate, or graduate degree programs would count toward this requirement as well. In addition, professional service contributions, such as service on professional association boards or presenting at training events, courses, or conferences may count for up to 25% of the total hours required to be accumulated during the five-year period.

Often, the question is raised as to what is considered "relevant". Actually, the standard for this is quite flexible. While training in governmental accounting and financial reporting is always

recommended, at least to a certain degree, training related to management and leadership, information technology, and other similar topics are also considered relevant and often necessary in today's financial management environment.

As for the 100-hour professional training requirement, the "industry" standard is 1 professional training hour per 50 minutes of instruction. This is the same standard that is used for continuing professional education (CPE) standards for Certified Public Accountants. Thus, when attending any courses or conferences that advertise the number of CPE hours being offered, that number would apply exactly the same way for the certified finance officer requirements.

Finally, individuals should maintain their own records supporting the number of hours of professional training that they have accumulated during each five-year certification period. While the NCGFOA does not require that copies of "certificates of completion" be submitted when applying for certification renewal, the applicant is required to provide a listing with the renewal application that includes:

- Nature of course, conference, webinar, etc. taken during the five-year period
- Date(s) taken and location (if applicable)
- Number of professional training hours for each event
- Grand total of professional training hours for the five-year period

There may be circumstances where an individual has been unable to meet their professional training requirements during their certification period. While the certification may not be renewed then, once the number of required hours have been met, they may apply for renewal at that time. Assuming all other requirements have been met, the renewal will be approved and the new certification period will begin the *following* January 1st.

Currently, there are no provisions for professional training hours to "carryover" to the next five-year period. Thus, if one accumulates more than 100 hours in one period, they may not apply the overage to the next period.

Lapses in Active Service

Occasionally, a certified finance officer ceases to work in a position eligible for certification, most commonly when they leave local government service altogether or move out-of-state (even if they still remain in local government). At that time, their certification status is considered inactive (or suspended). The certification is *not* revoked and can potentially be reactivated, depending on the following potential scenarios:

1. If one re-enters eligible government employment in North Carolina during their inactive five-year certification period, they may reactivate their status, assuming they are able to meet the three requirements for renewal (referenced earlier in this post).

2. If one re-enters eligible government employment during their inactive five-year certification period but is unable to meet the professional training requirements within that period, they have two years (from the date of eligible employment reinstatement) to complete the requirements. If they re-enter eligible employment *after* the original certification period has ended, they also have two years to meet the requirements to renew the certification.

It should be noted that qualifying professional training may have been accumulated even during the period of time that the certification was inactive. While those training hours may be counted, at least 40 hours of the total must have been accumulated during the most recent two years leading up to the renewal/reactivation date.

Use of Professional Title

Currently, there are no committee guidelines on how the title of certified finance officer may be used. I am often asked what letters one could put behind their names for business cards, bios, resumes, etc. After I resist the urge to say things I should not, I advise that the most common combination that I see is CLGFO (Certified Local Government Finance Officer). This is not required, nor is it discouraged.