



sba

SCHOOL BUSINESS AFFAIRS

March 2019 | Volume 85, Number 3

Association of School Business Officials

Managing Change in School Business

**Moving to the
Superintendent's Office
Mentoring Up
The Changing CTO Role**

**Also: Spotlight on the
Eagle Institute**



WIN A FREE REGISTRATION

+ a Meet and Greet with Keynote Speaker Ariane de Bonvoisin



ASBO INTERNATIONAL
ANNUAL CONFERENCE & EXPO
OCTOBER 25-28, 2019
NATIONAL HARBOR, MARYLAND

16 CHANCES TO WIN!



FIRST GENERAL SESSION SPEAKER

Ariane de Bonvoisin

Writer, speaker, and professional coach
featured in *Business Week*, *Oprah Magazine*,
Good Housekeeping, and more!

Be inspired as Ariane covers how to navigate change successfully by sharing her 9 Principles of Change.

ENTER BY MAY 23

asbointl.org/Drawing



ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL

PROUD SPONSOR



Security Benefit®
TO AND THROUGH RETIREMENT



RECOGNIZING **INNOVATIVE** DISTRICT PROJECTS...



...AND THE **LEADERS** WHO MAKE THEM HAPPEN



APPLY OR NOMINATE BY MAY 1
asbointl.org/Pinnacle

PROUD SPONSOR



MANAGING CHANGE

- 8 Critical Skills for Today's CTO**
By Frankie J. Jackson, RTSBA, CETL
- 12 Mentoring: Moving the School Business Profession Forward**
By Ed Chabal
- 16 Taking the Next Step: From the School Business Office to the Superintendent's Office**
By Kristopher P. Monn, Ed.D.
- 24 Transitioning to Shared Services—Are You Ready?**
By Kevin Dale
- 27 Managing Change in the School Business Profession**
By Working SBM
- 28 Eating the Elephant: Steps Toward a Balanced Budget**
By Jerry Gibson, Ed.D.



8 12

ASBO SPECIAL

- 20 Unique Value of the Eagle Institute**

DEPARTMENTS

- 5 PRESIDENT'S MESSAGE**
- 6 PUBLISHER'S MESSAGE**
- 33 MANAGEMENT BRIEFCASE**
Transitioning to a New Boss
By Nan Wodarz, Ed.D.
- 35 LEGAL ISSUES**
Managing School Crises: Before, During, and After
By Charles J. Russo, J.D., Ed.D., and David Dolph, Ph.D.
- 36 AD INDEX**
- 38 TOOLS AND RESOURCES**
- 40 SPOTLIGHT ON RODNEY COOK**

COVER PHOTO BY BOARDINGNOW/ISTOCKPHOTO.COM



Success Story...

This Could Be You!

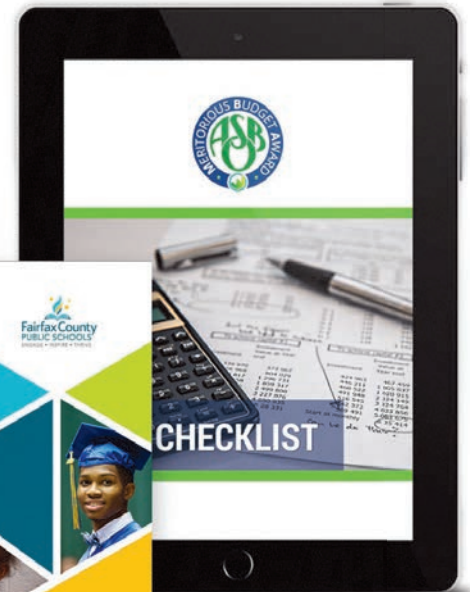
"This designation **proves to your community** that you have the skill set to be successful and it **proves to your superintendent that you have the experience and knowledge necessary** to maximize limited resources to make sure your students achieve their goals."

*LaShahn Gaines, CPA, SFO
Chief Financial Officer
Spotsylvania County Public Schools
Fredericksburg, VA*

LEARN MORE ABOUT EARNING THE SFO®!
asbointl.org/SFO



Ready to Build an Award-Winning Budget? **START HERE**



- Instructional **Videos**
- MBA Criteria **Checklist**
- Award-Winning Budget **Examples**
- Q&A
- **and more!**

[**asbointl.org/MBResources**](http://asbointl.org/MBResources)

PROUD SPONSOR



Leading for Change

By Tom Wohlleber, CSR



2019 Board of Directors

Claire Hertz, CSBA, SFO
Vice President



Charles E. Peterson, Jr.
MBA, PRSBA, SFO
Immediate Past
President



Michael Johnston
Director through 2019



Angela Von Essen
Director through 2019



Marvin Dereef Jr., SFO
Director through 2020



Bill Sutter, SFO
Director through 2020



Susan Harkin
Director through 2021



John Hutchison, CPA, SFO
Director through 2021



“Leadership is a deliberate action. It occurs when something happens; it is not passive. Leadership results in change. We work in a change environment and changes come in various forms. Often, we are forced into accidental change, but accidents are not leadership. When there is an accidental change, leaders often emerge; however, leadership must involve a deliberate action to shape the environment. If change does not occur, leadership has not occurred.” (Author unknown)

This is one of my favorite quotes about leadership because it reinforces the important relationship between leading effectively and successfully facilitating change. It also recognizes that purposeful or deliberate action by leaders is critical to achieving impactful or sustainable organizational change—to bringing about change that “sticks.”

School business officials play a key role in leading and managing the change process in their districts. School boards, superintendents, and principals as well as teachers, support staff, and the community look to school business officials to use their knowledge and experience to analyze and improve existing processes and systems.

Effective SBOs continuously research and evaluate potential opportunities or innovative solutions that may reduce costs, improve efficiency, and/or enhance service levels. They are logical yet creative thinkers, seeking options and challenging assumptions while incorporating research into decision making.

Recognizing the importance of teamwork and the value of a variety of perspectives, effective SBOs respect and welcome input from others, fostering collaboration and empowering others. They share their lessons learned with their colleagues.

Key Elements

Effective leadership is essential to successful change. Key elements in managing the change process from a leadership perspective include:

- Build trust. This is critical to building support and for helping reduce possible resistance to change.
- Identify stakeholders. Understand who needs to be involved in the change process, who the potential influencers are, and who may or will be impacted by change.
- Start with “why.” Clarify, early on in the change process, why change is needed or necessary. Define the change and its alignment to your district’s goals or strategic plan.
- Develop a communication strategy. Communicate intentionally and regularly with those involved in the change process and those impacted by change.
- Listen carefully and be open to feedback. Be willing to adjust the change process based on feedback received from stakeholders.
- Measure the change process. Formulate a methodology or metrics for evaluating the success or effectiveness of the change.

Leading with Vision

Any time two or more school business officials get together to talk about a new software system, the latest GASB statement, best practices in risk management, or any other school-business-related topic, the discussion inevitably turns to how those new products, policies, or resources benefit the students in their district. Clearly, our vision as leaders is to ensure our schools and districts provide the resources and services our students need to succeed in school and beyond.

We do that by leading and managing change.

Tom Wohlleber
Chief Financial Officer
Casa Grande (Arizona) Elementary
School District

MANAGING CHANGE



Managing change has always been a focus at ASBO HQ, but especially during the past 18 months. We experienced our expected changes—new staff, new board of directors, new meeting locations, new initiatives to meet new goals. But moving our headquarters office last August required quite a bit of extra planning, ingenuity, and flexibility. (See the October issue of *SBA* for photos and a bit more history.)

Moving a team of 20 staff members who for the most part had their own offices into a shared, more open work space required some planning.

Recognizing the importance of buy-in and sense of ownership, we involved the entire team in the decision-making process as much as possible, from input on furniture and decorating to personality type work groups for seating.

Here are some of the things we learned as we moved into our new workspace:

- Involve the team as much as you can in the planning process.
- Get to know your team and how they work and make seating decisions based on that information.
- Create a safe environment that encourages uncomfortable feedback; listen and be prepared to act on that feedback.
- Create a space for productivity: for us, a versatile, adaptable Conference Room.
- Include a space for privacy: a phone booth for privacy when making calls.
- Create a space for creativity: ASBO Hub (an area to have small meetings) and Surface laptops (staff can easily move throughout the office).
- Create a space for fun: ASBO Café.
- Create a culture of respect: Library Rules (turns out we've all worked in an open space environment—a library).

Our next big change is just around the corner, as the ASBO International Board of Directors goes through the process of hiring a new ASBO International Executive Director.

We, with our new executive director, will continue to move the association forward, implementing our board's revised strategic plan and continuing to provide benefits to our members and value to our membership.

— Siobhán McMahon

Colophon: During production of this issue, Siobhan enjoyed listening to her daughter sing in the All District Chorus and finished reading *The Power of Positive Leadership*; Pat visited her son in North Carolina's Outer Banks; and Laura attended a staged reading of her daughter's newest play.



**ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL**

School Business Affairs

March 2019 | Volume 85, Number 3

SCHOOL BUSINESS AFFAIRS

(ISSN 0036-651X) is the professional journal of the Association of School Business Officials International and is published monthly by the association. Periodical postage paid at Herndon, Virginia, and additional mailing offices.

Postmaster: Send address corrections to *School Business Affairs*, 44790 Maynard Square, Suite 200, Ashburn, VA 20147; 703.478.0405

2019 BOARD OF DIRECTORS

PRESIDENT — Tom Wohlleber, CSRM

VICE PRESIDENT — Claire Hertz, CSBA, SFO

IMMEDIATE PAST PRESIDENT — Charles E. Peterson Jr., MBA, PRSBA, SFO

DIRECTORS

Michael Johnston

Angela Von Essen, MBA, CSBA

Marvin Dereef, Jr., SFO

Bill Sutter, SFO

Susan Harkin

John Hutchison, CPA, MBA, SFO

PUBLICATIONS POLICY

The materials published in each issue represent the ideas, beliefs, or opinions of those who write them and are not necessarily the views or policies of the Association of School Business Officials International. Material that appears in *School Business Affairs* may not be reproduced in any manner without written permission.

EDITORIAL ADVISORY COMMITTEE

CHAIR — David Bein, SFO

VICE CHAIR — Matthew M. Lentz, MPA, RSBA, PRSBA, SFO

Karen Starr, Ph.D.

Brian Brent, Ph.D., CPA

Stan Wisler, PRSBA

Paul Bobek, CPA

Louis Pepe, MBA, RSBA

Leslie Peterson, MBA

Cindy Reilmann, CPA, CGFM

BOARD LIAISON — Claire Hertz, CSBA, SFO

EDITORIAL STAFF

PUBLICATIONS DIRECTOR — Siobhán McMahon, CAE

EDITOR — Patricia George

DESIGN — Laura Carter

Carter Publishing Studio

www.carterpublishingstudio.com

EDITORIAL OFFICES

44790 Maynard Square, Suite 200, Ashburn, VA 20147

Phone: 703.478.0405

Fax: 703.478.0205

Home Page: www.asbointl.org

Email: pgeorge@asbointl.org

ADVERTISING INFORMATION

The YGS Group

3650 W. Market St., York, PA 17404

Phone: 717.430.2351 • Fax: 717.825.2171

Laura Gaenzle

laura.gaenzle@theygsgroup.com

SUBSCRIPTION RATE

Seventy dollars of ASBO members' annual dues are designated for *School Business Affairs* subscription.

© 2019, ASBO International

UPCOMING WEBINARS



Webinars **are a free benefit** for school business officials who have an ASBO International Professional Membership!

Take advantage of this opportunity to stay current on hot topics from the convenience of your computer. Check out the upcoming webinar schedule.

asbointl.org/Webinars

Now Earn CPE/SFO credits for attending!

Critical Skills for Today's CTO

The chief technology officer has become a strategic position within district operations.

By Frankie J. Jackson, RTSBA, CETL

It's 7:45 a.m., and you're scheduled to give a presentation to the school board and community leadership team in 15 minutes. You need to add one new data point to your presentation—the finishing touch.

You sit down to enter your network account credentials. With your heart beating as fast as your fingers can

type, you enter your password and get the message "The network is currently not available." Panic-stricken, you wonder why you left this task until the last minute.

It's 8:10 a.m., and as you head down the hall to the meeting, thinking about how you're going to wing it, you hear someone say the network is down because of a



Frankie Jackson, left, works with a budget analyst to meet district technology needs now and in the future.

PHOTO COURTESY OF FRANKIE JACKSON

cybersecurity attack. No one is sure whether the district is being held hostage by ransomware or experiencing a DDoS (distributed denial-of-service) attack. It sounds like digital warfare. Others report that the network is down because of a break in fiber connectivity. No one knows when connectivity will be available.

You hear that the chief technology officer (CTO) has been contacted. She's working with the technology team to assess the situation and to prepare a district-wide communication.

In the meantime, all systems are down—business, student information, classrooms, food service, security and alarm systems, building automation, phones—because all school systems are powered by technology.

Because technology enables the delivery of education, today's CTOs are in a strategic position to contribute to the district's success.

The CTO Transition

The CTO is the highest-ranking technology leader in a school district. The position carries a range of titles: chief technology officer, chief information officer, director of technology, among others. CTOs come from a variety of backgrounds, including technology, information systems, instruction, administration, and business.

For example, I spent the first 10 years of my career as a software engineer and program manager at the National Aeronautics and Space Administration working on the space shuttle transportation and station operations contracts. In the 1990s, I entered the world of public education as a technology director of a school district with 20,000 students. At that time, technology directors were considered leaders of hardware and software, student accounting, and business systems.

As technology demands increased, the scope and responsibilities grew exponentially. By the early 2000s, technology directors were elevated to a higher position, typically called the chief technology officer. Not only did the title change, but the scope and responsibilities shifted dramatically. With higher expectations increasing with each passing year, the CTO has become a critical strategic position within school district operations.

By 2013, I had moved to one of the largest districts in the nation, the Cypress Fairbanks Independent School District in Texas, which had more than 116,000 students. My first challenge as a CTO was to work with district stakeholders to build and pass a \$1.2 billion bond package. The bond proposal covered funding for upgrades to the security, technology, facilities, and transportation systems—projecting administrative and instructional technology needs through 2020.

Clearly, with no end in sight to the massive implications and growth of technology, CTOs must broaden

their perspectives and succeed as leaders, embracing the ambiguity of their job.

10 Functions of the Successful CTO

As actively engaged professionals and consumers of their district's technology resources, school business officials understand the value of a high-performing technology program. Here are 10 functions that are critical to being a successful K–12 CTO today.

1. Enterprise-level systems synthesizer. If your district has implemented technology systems that won't "talk to each other," you'll understand how vital it is that the CTO think at the enterprise level before implementing any system or building a facility. Technologies are a synthesis of complex systems with interdependent operations. Successful implementations require alignment and integration of data. CTOs must have X-ray vision to understand how the district works as a whole. Otherwise systems fail, and time and money are wasted.

With higher expectations increasing with each passing year, the CTO has become a critical strategic position within school district operations.

2. Visionary education technology leader. Superintendents and school boards now expect the CTO to shape the district's vision, because technology is the underlying foundation of all education programs. CTOs must envision the world of the future, then build systems and networks to lead the district's transformation.

Being a visionary isn't enough. The CTO must be a visionary *strategist* who maps out plans to support the district's vision, communicate and articulate the value of those plans, and then influence others to buy in and ultimately get the work done.

3. Instructionally centered enabler. Students, parents, teachers, and instructional leaders are the district's ultimate customers. Because CTOs are critical enablers of education, they are expected to ensure that all modes



Frankie Jackson project-plans with a strategic partner.

of technology access and services are available 100% of the time, whether they be family mobile apps with real-time grades, attendance reports, and homework assignments, or online classroom websites and instructional resources. The CTO is expected to be on call 24 hours a day.

4. Disruptive catalyst for action. Disruptive events happen, triggered by new technologies, weather disturbances, cyberattacks, emergent social issues—to name just a few phenomena. CTOs must be capable of making transformational changes quickly and, at the same time, managing the risk.

At the enterprise level, a change in one system may disrupt another. Even a software upgrade can halt a critical system. The entire district operation is now in the hands of the CTO, who must act with a sense of urgency, remain calm, think through all the repercussions, and then act quickly and initiate change.

5. Forerunner of innovation. Technology is about being innovative and finding ways to automate and improve. CTOs have long been innovators; what's changed is that they are expected to be *forerunners* of innovation, to see a space that others can't see, or to reimagine current systems and find new ways to improve them. They are expected to create new value and lead districts to greater dimensions of performance.

Both instruction and administration are expected to drive district innovation. CTOs inspire and collaborate cross-functionally among staffs and organizations that don't normally work together and capitalize on new knowledge to innovate. CTOs represent a sign of something that's going to happen, so we must be prepared or we won't survive.

6. Strategic mastermind. From the district level to the device level, tentacles of technology affect everything and everyone. CTOs don't take care of just one organizational unit, such as transportation or grade-level instructional systems, they sustain them all.

Technology users are like car drivers—except that some of our drivers are in kindergarten, some are parents, some are teenagers, some are school business officials, others are custodians. They vary from A to Z. CTOs must be strategic in ensuring that all students and staff members are served equitably in a safe

environment. To measurably advance the district's vision and strategic plan requires consistent strategic alignment with defined critical success factors and efficient processes.

7. Fact-based decision maker. Many variables affect the success of technology programs. Effective problem analysis and decision making require CTOs to measure the organization's performance. CTOs need accurate data to make decisions in a rapidly changing environment. Doing so requires defining critical success factors and collecting data to support key performance indicators. Data are needed to determine trends, projections, and cause-and-effect relationships that might not otherwise be evident.

Managing by fact is a skill in and of itself. Time, money, and student learning opportunities are on the line. CTOs can't afford to waste a minute or make a poor decision based on perception.

8. Skillful technologist. Districts may believe they hire CTOs “for technology support.” But to be credible not only at the executive level but with the technology staff, CTOs must walk the walk. They are building infrastructures to support multiple device connections, both inside and outside district facilities. Connectivity must be secure, fast, and ubiquitous. CTOs must be skilled technologists to survive.

To complicate matters, the IoT (Internet of Things) is quickly becoming integrated into all aspects of education. It’s complex to implement and sustain, and the cost in some cases is exorbitant.

9. Technology translator. The CTO’s communication style involves speaking, writing, and presenting, while using rich multimedia and emerging technologies—aligned with a perfectly crafted message to a wide range of audiences. Technology translation is knowing how to deliver a clear message and change how district stakeholders think, how to synthesize information and turn technical jargon into relevant analogies.

The CTO must know how and when to shift examples so everyone understands the message and the value it brings them. Being unable to connect with stakeholders is a showstopper for CTOs.

10. World-class service provider. Stakeholders expect world-class technology service. What could be more important than educating our kids and serving our staff members? To deliver, CTOs must understand the critical aspects of managing the performance of a technology organization. They must possess two strategic assets: leadership and a framework to improve performance.

Whether they understand the Baldrige criteria, the best practices of the ITIL (Information Technology Infrastructure Library), or the process and performance management methodologies of the American Productivity and Quality Center, CTOs must be motivated to deliver world-class technology service.

Unwavering Support

The strength of the skills demonstrated by your CTO will increasingly affect how your district operates. The

HOW DO CTOs BUILD THEIR LEADERSHIP CAPACITY?

Here’s the challenge. For the level of criticality that chief technology officers (CTOs) are responsible for, where do CTOs find genuine, useful, specific CTO professional development and course content? College courses don’t always prepare CTOs for the challenges specific to CTO leadership. With limited time, CTOs need practical, day-to-day knowledge and access to best practices. Here are some valuable resources:

The Consortium of School Networking (CoSN) is the only practice-based certification program available in the education technology industry that bridges technical knowledge to the understanding of the education environment, combined with the leadership skills needed to integrate technology across the curriculum to advance student outcomes.

CoSN (www.cosn.org) provides professional development and thought leadership to help CTOs be more effective. More than 50% of the Certified Education Technology Leaders (CETLs) hold district, cabinet-level positions, and 87% of the current CETLs recommend the program.

CoSN’s newly developed peer review program (www.cosn.org/PeerReview) helps districts align actual practice with best practices for a school system’s technology operations. Some state-level CoSN chapters also offer mentorship programs. For example, the Texas K–12 CTO Council offers a mentoring program for new or aspiring school CTOs (www.texask12cto-council.org/cpages/cto-mentoring-program).

ASBO International affiliates help districts build leadership capacity through management reviews. For example, Texas ASBO (www.tasbo.org/resource/mgt-reviews) works with districts to help improve efficiency.

ASBO International’s **Global School Business Network** (www.asbointl.org/Network) provides the opportunity to connect with professionals from around the world. It’s one of the few ways to get real-time answers to specific questions, share innovative solutions, and expand personal knowledge.

skills that in the past got technology leaders a seat at the table aren’t the skills that will keep them there. District leaders can help their CTOs become more successful by understanding their role and providing support.

Frankie Jackson is an independent chief technology officer and a national trainer for the CoSN Certified Education Technology Leader program. Email: FrankieJ.Jackson@outlook.com.

Mentoring: Moving the School Business Profession Forward

A mentoring program can improve recruitment and retention in school business.

By Ed Chabal



Do you remember the first day of your school business career? I do.

Having spent years working in the office of a certified public accountant, I was new to the school business profession. Unfortunately, the school business position had been vacant for three months, so no one was in the office to guide me through the basics of school finance or to tell me what I needed to tackle first.



If a longtime school business official in a neighboring district had not helped me through the first few weeks of preparing state reports, I might not be in this profession that I've enjoyed for 20 years. I still remember the generosity of that colleague who took time away from his own busy schedule to help me through that challenging transition into school business. He wanted to see me succeed just as much as I wanted to succeed.

Many of the issues that we face each day are unique to the school business profession, and we must draw on the expertise of those around us to find the solutions we need. My school business colleague did not withdraw after the first few weeks; he continued to check in with me for several months and made himself available to answer my questions. He was a true teacher who demonstrated the value of a mentoring program.

The Case for a Mentoring Program

As is probably the case for most ASBO International affiliates, we in Iowa have trouble attracting school business officials. Contributing to this challenge is the shortage of classes at local colleges and universities that prepare students specifically for the school business field.

Although ASBO International and its affiliates provide quality professional development for their members, those offerings are not necessarily tools for *attracting* members to the profession. Drawing the interest of potential new officials is a problem that we continue to address.

Because of the shortage of qualified school business officials, we must do all we can to keep the ones we have by giving them every chance to succeed. A mentoring program specifically for those new to the profession can guide them through

the difficult first year and can dramatically increase the chances of their making school business a life-long career.

Characteristics of a Mentor

Steven Spielberg said, "The delicate balance of mentoring someone is not creating them in your own image, but giving them the opportunity to create themselves."

The key component of a successful mentoring program is the mentor. An effective mentor is a source of knowledge and support whose role is to inspire and encourage the mentee and to contribute to the mentee's professional development. At the same time, mentoring is a way for the mentor to grow professionally and give back to the profession.

The mentor and mentee are unlikely to know each other before establishing the relationship, so it is important that they devote the first meeting, at least, to becoming acquainted, discussing expectations, and understanding the mentee's district and detailed job responsibilities. This foundational information will set the tone and guide future conversations.

To be successful, mentors must recognize the commitment required to make this activity a positive working relationship. An effective mentor does the following:

- Arranges frequent contacts through telephone, email, and in person.
- Sets aside time for the mentoring process and honors all appointments.
- Establishes open, honest communication as a forum for exchanging ideas.
- Keeps shared information confidential.
- Helps build self-confidence and offers encouragement.
- Introduces the mentee to a network of school business officials.

- Invites the mentee to regional and state meetings and makes him or her feel welcome.
- Listens.

In contrast, a mentor does not (1) plead lack of time when the mentee needs support, (2) offer so much advice that the mentee becomes totally dependent, or (3) criticize the mentee or the mentee's predecessor.

Mentoring SBOs in Iowa

Like most states, Iowa has had mentoring programs for teachers and administrators for years. When the Iowa legislature enacted the certification process for Iowa school business officials in 2012—requiring all Iowa school districts to have a licensed school business official on staff—it recognized the value of an effective mentoring program and made mentoring a requirement toward earning an Iowa school business official authorization.

The holder of an "initial" Iowa school business official authorization has two years to complete the one-year mentoring program to gain the standard Iowa school business official authorization. Those mentees must:

- Participate in weekly conversations with the mentor throughout the year.
- Maintain and submit a record of contacts with the mentor.
- Complete surveys to assist with program evaluation.
- Inform the program administrator if the relationship with the mentor is not meeting their needs or expectations.

Mentors for the program must:

- Contact mentees on a weekly basis.
- Complete surveys to assist with program evaluation.
- Maintain confidentiality of the interactions with mentees.
- Support mentees throughout the one-year period.

Mentors must also participate in district workshops on the objectives of the mentoring program, responsibilities of mentors, and so forth. Mentors receive recertification credit for their program participation.

The Mentoring Process

The Iowa mentoring program is administered by a mentoring program coordinator under the guidance of the Iowa School Business Management Academy.

When the Iowa Board of Education Examiners releases a notice that an initial school business official authorization has been issued, the mentoring coordinator contacts the potential new mentee to gather background information, such as job title, duties, financial software system being used, and geographic location. This information helps create the best match between the mentor and mentee.

Because of the shortage of qualified school business officials, we must do all we can to keep the ones we have by giving them every chance to succeed.

The mentoring coordinator matches the mentee to a mentor by looking at the following factors in priority order:

1. The mentor and mentee are located in same geographic area.
2. The mentor graduated from the Iowa School Business Management Academy.
3. They use the same financial software.
4. Their duties and responsibilities are similar.
5. Their districts are similar in size.

Once a mentor is selected, a GoToMeeting allows the mentor to learn more about the mentoring process. The training focuses on "how to mentor" rather than on "what to mentor." It also covers communication between the mentor and the mentee, including how to set up the first several meetings and what to talk about. The mentors receive additional resources during the year.

At the beginning of each month, mentors receive an email titled "Conversation Kick Off," that suggests relevant school business topics, learning opportunities, and additional articles that can be downloaded for discussion in future meetings. In addition, Iowa ASBO offers a calendar of critical dates that the mentor can use to remind the mentee of upcoming deadlines, such as state reporting.

The Iowa legislature specified that the mentor contact the mentee weekly as part of the program requirements. Weekly logs detail how the contact was made (email, phone, in person), when the contact was made, topics discussed, length of contact, and whether any follow-up action was required. These logs are turned into the mentoring program coordinator for review and to gauge program effectiveness.

Face time is usually at a premium during the one-year program. The spring and fall Iowa ASBO conferences provide an opportunity for the mentors and mentees to spend quality time together. On one of the conference days, the mentors and mentees have lunch together.

to discuss prearranged topics, such as communication styles, or to participate in informal group discussions about school finance issues.

Mentoring Results

In the six years the mentoring program has been operational, 116 mentees have completed the program with a very positive outcome. Iowa ASBO Executive Director Nancy Blow has this to say about the program: “The program has been successful on more fronts than we probably even know. It created a built-in network for a new person. They feel like they are on the team from the moment they receive a mentor.”

When the Iowa legislature decided to include mentoring as a part of the training for a new school business official, it also included mandatory evaluation of the program to ensure that it meets the needs of those new to the school business profession. Each year the program is strengthened by incorporating new ideas from the survey feedback.

The Iowa mentoring program and its success can best be summarized by a recent mentee: “I think the tools are there to be successful—the mentoring program, webinars, classes, and conferences. There is so much information to learn; it just takes time. The mentoring program helps because even though our formal mentoring time is over, I plan to keep in contact with my mentor and use him as a resource in the coming year.”

MENTORING RESOURCES FOR SCHOOL BUSINESS OFFICIALS

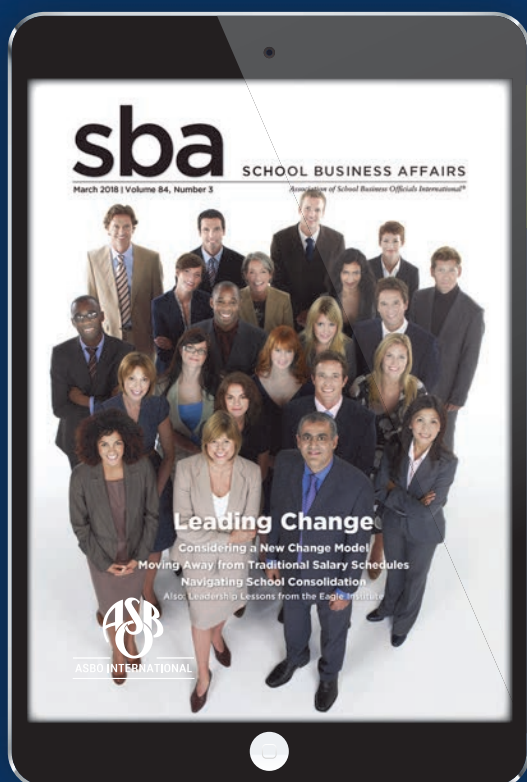
ASBO International helps support and retain school business officials and advance the profession by offering mentoring programs and resources.

ASBO INTERNATIONAL EMERGING LEADERS SCHOLARSHIP PROGRAM

The Emerging Leaders Scholarship program recognizes and supports 18 new professionals with five or fewer years of experience in school business. Recipients receive a \$2,000 scholarship to put toward travel and registration to the ASBO International Conference & Expo, which includes programming specifically for them; a strong network of peers and mentors dedicated to helping them develop their school business careers; and ongoing professional support and mentorship through the Global School Business Network’s Emerging Leaders online community.

Visit asbointl.org/Scholarship for more information or to apply.

Ed Chabal is the chief financial officer for the Mount Pleasant Community School District in Mount Pleasant, Iowa. He has served as a school business mentor for three Iowa ASBO members. Email: ed.chabal@mtpcsd.org



SBA ANYWHERE

Use your member login to read, download, print, or share relevant resources, case studies, and articles with the digital *School Business Affairs* (SBA).

asbointl.org/SBA

Looking for a specific article?

Access every issue since 2009 in the digital SBA archives.

Taking the Next Step: From the School Business Office to the Superintendent's Office

School business officials who move into the superintendency may face unique challenges.

By Kristopher P. Monn, Ed.D.

As our colleagues in school business management increasingly move into the superintendency, they may face some unique challenges. Just as superintendents who transitioned from the principalship

or curriculum roles may have had growing pains while getting a handle on school finance and operations, superintendents who move up from the school finance arena can experience hurdles of their own. I offer here suggestions for a

successful transition based on my own experience moving from the school business office to the superintendent's office. Many suggestions are applicable to other job transitions as well.

1. Setting Entry Plans and Building Relationships

One of the most effective transition strategies for any new position is to craft a formal entry plan before beginning the job.

Jack Barshinger, a former superintendent in Illinois, asked all of his incoming administrators to develop a plan that outlined how they would begin their role and how they would immerse themselves in the culture and processes of the district. The final entry plan would include interviewing key stakeholders of the district and the community as an effective and methodical way to gain critical information about the work and social climate of the district.

When I began my tenure as superintendent in Minooka, a PreK–8 public school district with seven schools and 4,850 students, one of my first actions was to establish entry interviews with every member of the administrative team and each board member.

Entry interviews allow new superintendents to learn about the history



and culture of the district even as they begin the process of establishing a positive relationship with the district staff and stakeholders. From there, they can reach out to teachers and union leaders, municipal and elected officials, parent leaders, and other key figures in the community to weave a comprehensive story of the district and begin establishing relationships.

Learn everything you can about the district. If possible, have a few trusted advisors on whom you can rely to be honest, to bounce ideas off, and to provide guidance.

Establishing a relationship with the board of education is a must—not just with members as individuals but also as a group. Managing the personalities and ideologies of the board can be difficult, so setting clear norms and communication protocols for board members is a good idea. Creating the right dynamic for meetings can pay huge dividends in the long term.

2. Sharing Your Vision

Whether you have been promoted to the superintendency in the district where you have worked for years or you transition into the position in a new district, your vision of what education should look like will be different from that of your predecessor.

For school business officials who now lead the charge, developing shared ownership of their vision of the ideal classrooms and instructional practices can be one of the most challenging yet most important tasks of the transition. And this is the point where school business officials may face a unique hurdle: they lack classroom or school building experience.

Even if your career has taken you through the school business office rather than the classroom, you know what makes great schools and great school districts. Spend the first several months on the job sharing your vision with your stakeholders inside

the district and in the community. Listen to staff, parents, students, and the community about what they think a good school system looks like and be open to advice, guidance, and probably some push-back.

By emphasizing that you are working with them to make the district the best it can be, stakeholders will soon recognize that they do, indeed, have an education leader at the district's helm.

was to pull back my direct involvement in tasks I had always done.

The superintendent's role is less doing the tasks and more leading others and providing them the resources and support to succeed in those roles.

We must give our leaders and staff members the autonomy to do their jobs, so stepping back from the day-to-day tasks is a big step to make in a leadership role.

Establishing a relationship with the board of education is a must—not just with members as individuals but also as a group.

3. Leading Education Leaders

The superintendent is charged with leading the district, and that means leading other leaders—department heads at the district level as well as building principals and the other education leaders in the district.

Arrange meetings and other opportunities for these leaders to come together to discuss the district's goals and to collaborate on how to achieve the mission and vision together. Empower education leaders to lead.

4. Moving from Doing to Leading

The amount and scope of workflow and tasks involved with the role of school business official is very hands-on. Finance, business operations, facilities, transportation—school business officials have their hands in it all.

As I transitioned into new leadership roles, including the superintendency, one of the harder things to do

5. Becoming the Face of the District

One of the biggest differences between a school business official's role and the superintendent's role is visibility. That's not to suggest that school business officials don't have plenty of visibility—they do. However, the superintendent is the face of the school district, getting involved in local organizations, meeting with local and state leaders, meeting with parent groups, being interviewed by the media, and taking the blame for anything that may go wrong in the district.

Being comfortable with that visibility is an important piece of the transition to the superintendency.

A Current Transition

One of our school business colleagues in Illinois is currently transitioning into a superintendency. As I was reflecting on my experience, I reached out to see whether my colleague had any tips to share. Here they are:

“Learning to balance the leadership of the organization within the local political environment will be a new challenge.”

- Building the cabinet: “Selecting the right people for your team can be difficult. The district has many strong leaders who all have excellent qualities for advancement.”
- Developing the relationship with the board: Find time to build relationships with board members. “There are times when they ask my opinion, but I do not want to contradict the current superintendent. It is a challenging dynamic.”
- Meeting and interacting with local political leaders and other key stakeholders: “I have had wonderful conversations with many stakeholders, quite a few of whom have offered suggestions for improvements to our school system. Learning to balance the leadership of the organization within the local political environment will be a new challenge.”

- Ensuring a successful transition for my predecessor: “We have all experienced leadership transitions in some manner. Understanding that the current superintendent is still in charge but still wanting to advocate for long-term decisions creates a delicate balance.”

Plan for Success

A background in school business management has given you a great foundation of the workings of a school district. Use that optimism, that energy, and that knowledge. Take the time to establish those key relationships, make some small but noticeable improvements, and lead your district forward.

Kristopher Monn is superintendent of schools for Minooka CCSD 201, Minooka, Illinois. Email: kmonn@min201.org

WHAT ENROLLMENT CHALLENGES DOES YOUR DISTRICT FACE?

INCREASING ENROLLMENT
DECLINING ENROLLMENT
ATTENDANCE BOUNDARY CHANGES
SCHOOL OVERCROWDING
GRADE CONFIGURATION CHANGES
SPECIAL PROGRAM PLACEMENT
SCHOOL CONSOLIDATION
CLASS SIZE REDUCTION
FEEDER SCHOOL CHANGES
OPEN ENROLLMENT / SCHOOL CHOICE
BETTER INSIGHT INTO YOUR COMMUNITY
FISCAL AND STAFFING PLANNING
NEW HOUSING DEVELOPMENT

We Provide ENROLLMENT SOLUTIONS



www.DecisionInsite.com | 877.204.1392

Your Schools' Financial Data is Critical.

That's why the software with which you manage it is, too.



HARRIS
School Solutions

Find out more at:

www.think.harrisschoolsolutions.com/IASBO

WHAT MAKES THE EAGLE INS

Attendees share their thoughts on lasting connections

ASBO International's Eagle Institute is a unique gathering of school business leaders and eminent leadership experts in a historically significant setting specifically chosen to illuminate and emphasize lessons of leadership.

What makes this conference distinctively valuable for personal and professional enrichment? Past attendees share their perspectives.

"The leadership and networking is unmatched."

An Immersive, Small-Group Experience

In this distinctive professional development event, a core group of school business leaders spend four days as a cohesive, interactive group. Sharing the full experience, participants engage in in-depth discussions and build lasting connections.

The intimate group size and activities are designed for interactive presentations, one-on-one conversations, and relationship building. Regina Robinson, a school business administrator from New Jersey, appreciated the leadership training and "insight into best practices from peers and speakers."

Denny Costerison, executive director of Indiana ASBO, says "It's a great opportunity for personal growth and to make a great group of friends. You may see someone with whom you shared an Eagle Institute experience 10 years ago at another meeting... and you actually know that person."

Personal Focus

The school business leaders who attend the Eagle Institute are experts in their field, innovators of process, and

"I get more out of this event to improve my leadership skills than any other event I attend."



masters of logistics. This conference is an opportunity to step away from the day-to-day matters of school business and focus on personal awareness and leadership development.

Attendees have an opportunity to look at how their own judgments and beliefs affect decision making, management style, and their ability to cultivate a team atmosphere. Actively recognizing that our way of thinking is communicated through our behavior and influences those around us is a common takeaway of the Eagle Institute.

"The small groups allowed me to get to know people better—connections formed. I loved the whole thing. Connection to history applicable to today. Wow."

Arizona school business official Zeek Ojeh describes the Eagle Institute as "very specialized. Superior, top-class presenters on cutting-edge and changing trends in leadership, emotional intelligence, and education, geared specifically to top management in school business."

Historical Context

In what a 2018 attendee described as a "unique slant" to experiential learning, presenter Jeff McCausland added a pertinent history lesson that allowed participants to deepen their own knowledge of history and to see firsthand what prominent leaders may have been considering when they made critical decisions.



TITUTE UNIQUELY VALUABLE?

actions, personal development, historical context



“Learning about your country’s founding fathers through passionate presenters was inspiring and educational,” according to Wisconsin school business official Kathy Davis. Suzanne Jones, MIS coordinator from Maryland, adds that the Eagle Institute provides an “amazing history lesson. A very well-versed, polished, and prestigious collection of presenters.”

Australian school business manager Alan Williams, who also found the link to historic events interesting, believes the institute is “a worthwhile event—great for networking and leadership trends.”

“The speaker’s ability to draw conversation out of the participants was just as inspiring as the content itself.”

According to Angie Peterman, executive director of Oregon ASBO, the Eagle Institute “utilizes a historic view of significant leadership decisions. It includes an experiential component not typically found in our training activities and brings top-notch leaders to explore the significant choices and decisions faced at key points throughout history and today.

Clint Johnston, a superintendent from Missouri, calls the Eagle Institute “an amazing event with something for everyone in attendance. Great sessions. Great professionals. Amazing professional development.”

“Because I came into this job from business, I don’t have the same lens as people who came from the education side. I share ideas from business, and am able to integrate the ideas my peers with different backgrounds share with me.”

Superior Resources

“There is great value in the information I can bring back and put into practice in my district,” Ojeh says. “Every time I come back we sit down and go over one or two areas I think are pertinent. One year I presented on emotional intelligence. Another year, leader as negotiator. Another, leader as facilitator. I debrief with team members from food services, technology, transportation, risk management.... Everybody gets something out of it.”

School business official Louis J. Pepe from New Jersey sums up the atmosphere of the meeting: “The Eagle Institute provides unrestrained discussion that fosters learning, growth, and development for leaders in the business of education.”



The Eagle Institute is proudly sponsored by AXA. The 2019 Eagle Institute will take place July 16–19, in West Point, New York. Visit asbointl.org/EagleInstitute for more information.

ADVANTAGES OF PROPANE SCHOOL BUSES

Economical, emissions-reducing propane buses put money back into budget

Today, nearly 1 million students ride to and from school in buses fueled by propane autogas. About 850 school districts operate propane buses due to their clean-operating, cost-reducing technology.

Propane autogas, the name for propane when used in transportation, provides the lowest total cost of ownership compared with other fuels. Maintenance is simpler and less expensive than diesel. Plus, propane buses remove the anxiety of cold-start issues that diesel buses are known for. No more school delays because the buses won't start!

"With propane, we expect to save \$3,500 in fuel and maintenance costs per bus per year — that's \$315,000 that can be allocated elsewhere, like back in the classrooms," said R. Sam Ham, executive director of transportation services for Fulton County School System.

A Greener Profile

Buses fueled by propane autogas emit fewer greenhouse gases and total hydrocarbon emissions, and virtually eliminate particulate matter, when compared to diesel buses.

Blue Bird Vision Propane's ultra-low nitrogen oxide (NOx) engine is 90 percent cleaner than the Environmental Protection Agency's current emissions standard.

Propane school buses may help school districts obtain funds from the Volkswagen Environmental Mitigation Trust and other federal and state grants. "In addition to the emissions reduction, we have realized tremendous cost savings and improved safety for our students with propane buses," said Renee Dawson, transportation director of DeKalb County Central United School District in Indiana.

A Safer Alternative

Propane autogas is a nontoxic, non-carcinogenic and non-corrosive fuel that the EPA classifies as a non-contaminant. Unlike diesel exhaust systems, propane autogas doesn't emit strong-smelling fumes, allowing for a more pleasant ride. Propane engines also operate more quietly, increasing safety and decreasing driver fatigue.

The EPA considers diesel exhaust a serious public health problem. Diesel exhaust contains small particles that can become stuck in the lungs and is known to aggravate asthma. With propane school buses, students, drivers and school staff aren't exposed to diesel's harmful particulate matter.

There are more than 14,000 Blue Bird propane school buses operating across the U.S. and Canada. They can be found in 24 of the top 25 population markets. These propane buses are equipped with a ROUSH CleanTech fuel system and Ford engine, and are backed by Ford's factory warranty.

ROUSH®
CLEANTECH

ROUSH CleanTech

12170 Globe St., Livonia, MI 48150
800.59.ROUSH | ROUSHcleantech.com
propane@ROUSHcleantech.com





Operating propane buses allows school districts to put money back into classrooms, where it counts most.



THERE ARE MORE THAN 14,000 BLUE BIRD PROPANE SCHOOL BUSES OPERATING IN 850 SCHOOL DISTRICTS ACROSS THE U.S. AND CANADA.

Propane school buses:

- Offer the lowest total ownership costs.
- Reduce maintenance expenses.
- Have no cold-start issues.
- Meet environmental initiatives.
- Lessen noise pollution.
- Operate on an abundant, domestically produced fuel.
- Help districts obtain funding.

Transitioning to Shared Services— Are You Ready?

Sharing common services among districts may be a win-win proposition.

By Kevin Dale



If your district is looking for ways to save money or resources, improve communication between districts, and consolidate services, now might be time to consider shared services.

Shared services are the use of personnel, resources, or facilities by two or more districts or entities to achieve a common goal or outcome, such as more efficient

processes or decreased expenses. Because two or more distinct districts and two or more distinct school boards are involved in these partnerships, each district must reach a consensus on the advantages for the district itself, the taxpayers, and the families affected. If the partnership is equally advantageous to each participant, the venture will more likely be successful.

Possible Areas for Shared Services

Let's look at a few scenarios in which shared services could be an option.

Transportation. When multiple districts are within a similar taxing area—for example, a high school district with multiple feeder districts, whose school borders overlap an elementary school district—it may be economically beneficial for the two districts to combine transportation services to avoid duplicating bus routes and supporting redundant administrative and mechanical positions.

The districts determine the advantages for each party, then draw up an intergovernmental agreement (IGA) explaining how the services will be shared, the terms of the agreement, and the responsibilities of each district. With both boards approving the IGA, the districts can begin sharing the services.

Technology. As districts enhance their technology services, they may find that sharing the fiber network, Internet service provider, or server banks to reduce equipment costs is a reason to establish a sharing agreement.

Once again, as with any shared services, entering into a shared IGA is important to keep all parties in check.

Grounds. Districts may find ways to share services, equipment, supplies, or personnel as they maintain buildings and grounds. Agreements may cover mowing, snowplowing, parking lot sealing and striping, and skilled maintenance personnel.

Administration. Sharing an administration model requires a more structured and strategic plan at the outset. Think of shared administration as a corporate merger or takeover. Would a high-level corporate executive rush into a merger because it sounded like “a good idea”? Certainly, the CEO would conduct due diligence by exploring the other company, looking at its climate, personnel, financials, and future.

School districts considering this model should regard shared services in the same manner. If districts are going to share a superintendent, they must ask how the superintendent will interact with both districts. The planning process must define each position in the administration and how it will be filled. A strategic plan can guide the team through each step of the transition process.

Education and Inclusion

Taking a win-win approach will help everyone feel invested in the shared services process. The following are among the questions to consider:

- Has everyone on the administrative team been consulted about this venture?

Sharing an administration model requires a more structured and strategic plan at the outset.

- Has feedback been solicited from all potential stakeholders?
- Do stakeholders feel included in the process and do they understand the objective of this venture?

Education and inclusion are the keys to any successful transition. If you haven't asked yourself these questions, your team may not be in the same book, let alone on the same page that you are—and heaven forbid they aren't even in the same library.

Sharing Services in Rochelle

Rochelle, Illinois, has two districts. Community Consolidated School District 231 consists of four elementary schools and a middle school that feed into the high school, Rochelle Township High School District 212. This configuration presented us with an opportunity to consider shared services in transportation.

We found that by combining duplicate bus routes and hiring one transportation director and one mechanic to service both districts, we could reduce the size of the staff and save money.

In summer 2018, the two Rochelle districts began to consider combining administrative services by sharing a superintendent and business office. The discussion began because the superintendent for School District 231 was preparing to retire and we'd need to hire a replacement, the districts were looking for an alternative to consolidation, and we were in search of ways to benefit the taxpayers by streamlining some of the administrative services and financial oversight.

The deliberation process began with meetings between the school board presidents and the superintendents. The executive board and administration met regularly and worked out an agreement that was shared with the other board members, legal counsels, and eventually the administration and faculty.

Ultimately, the high school superintendent and business manager/chief school business official were charged with overseeing both districts starting in July 2018.



The elementary school district and high school district in Rochelle, Illinois, share services to improve efficiency and decrease costs. Photo courtesy of Rochelle Community Consolidated School District 231.

Lessons Learned

This process, though trying at times has possibilities to improve services for both Rochelle districts and their staff.

Although the Rochelle executive boards and administrators believed this streamlined process allowed them to work out issues and reach an agreement with minimal conflict, in hindsight, the process could have been streamlined even more by including additional administrative personnel in the planning process and by allowing discussion and fine-tuning of all aspects of the proposed sharing before implementation.

Doing so might have helped the districts avoid subsequent issues that arose around staffing. The lesson learned was that when considering any shared service relationship, plan for any unseen issues that could arise.

With any shared service IGA, it's important to ensure that all parties involved review the agreement annually.

This review can inform the executive boards of how the agreement is evolving and whether enhancements might improve the agreement with regard to meeting the needs of the students, teachers, administration, staff members, and boards.

Combining Efforts

With each new endeavor or step that you take to enhance your services to your patrons, strive to address the needs of everyone involved and seek their input. Although you may not always heed their advice or act on their suggestions, involving them in the decision-making process will give them a sense of ownership.

Kevin Dale is business manager/chief school business official for Rochelle Township High School District 212 and Rochelle Community Consolidated School District 231, Rochelle, Illinois. Email: kdale@rthsd212.org



Managing Change in the School Business Profession

Flexibility is the key to managing change in the profession.

By WorkingSBM

I can't imagine that anyone really wants to be famous: unable to nip into your local market to pick up a few vegetables or walk through town in your scruffy jeans without being photographed and splashed all over the front pages.

No thank you, that's not for me—and probably not for you.

However, we do want recognition for the work we do and the effect we have as school business administrators. Having been a school business manager (or SBM as we call ourselves) in the United Kingdom for more than 15 years, I can see that our role is changing more rapidly than ever before. But I don't believe that is necessarily bad. We just have to adapt and be flexible, and we have to ensure that our skills continue to affect our organizations positively.

For many of us, that means our jobs will probably change beyond all recognition in the next few years. I sometimes wonder whether we are ready for that.

Opportunity in Change

Continuous change is hard work, especially if you don't agree with the direction of travel, as many don't. It can be frustrating, disorienting, and demoralizing. But I've noticed some advantages that everyone has the opportunity to grasp, if they choose:

Leadership. The SBM's skills are a necessary part of the education leadership structure, and more so now than ever before. They might not lead to a massive salary increase, but they do lead to formal recognition of the part you play in leading your school.

Training. In the UK, as schools work together and grow into larger multi-academy trusts, SBMs have more time and opportunities to undertake focused professional training and to specialize in areas such as finance, human resources, health and safety, and property management. Such professional development gives them formal transferable skills to take with them on their career path.

Networking. During the past two years, our professional networks have been strengthening. SBMs are not limiting their influence to their immediate area but are sharing best practices across the country and around the world. I predict that this movement will continue to grow.

Of course, even with our newly recognized leadership responsibilities, qualifications, and global networks, we don't all have to “do” education in the same way. It's easy to see that we still have much to learn from one another.

Taking the Lead

The increased recognition of my own role as an SBM has resulted, amazingly, in my being accepted to take seven students to the Change the World Model United Nations conference in New York this month. They will represent not only our school trust and the UK, but also the UN country we have been assigned: Côte d'Ivoire.

I don't have to tell you that I am beyond excited. The opportunity to support these young people at this prestigious event is a mind-blowing responsibility that I could never have imagined until just recently.

(So having never been to the United States, I am trying hard not to imagine experiencing New York City on the basis of some of my favorite TV shows, such as *Elementary*, *Friends*, and *Fame*.)

I have a lot of work to do before we go to ensure that the students get the most out of this experience. As Ms. Grant said in the opening scenes of *Fame*: “You want fame. Well, fame costs. And right here is where you start paying. With sweat.”

WorkingSBM is a school business administrator in the United Kingdom. Follow her on Twitter @workingsbm2017 or contact her at www.workingsbm.com.

Eating the Elephant: Steps Toward a Balanced Budget

Looming maintenance costs motivated this district to take a hard look at its budget.

By Jerry Gibson, Ed.D.



PHOTO COURTESY OF MARSHALL INDEPENDENT SCHOOL DISTRICT

Marshall Independent School District Superintendent Jerry Gibson maintains a focus on students—taking time to learn Spanish from a preschooler.

In August 2018, the school board of Marshall Independent School District voted to accept the 2018-19 budget with a \$1,246,366 shortfall. Adopting a deficit budget was nothing new; the school board had adopted deficit budgets in 5 of the previous 10 years.

However, in those years when the Texas school district cracked down on spending, the budget was realized without a deficit.

In 2018, school district officials knew they were facing significant maintenance issues that would require them to dip into the district's healthy fund balance. That new reality prompted them to develop a more conservative approach to spending and budget forecasts.

Marshall ISD had consistently kept a strong fund balance that exceeded the recommendation of the Texas Education Agency. However, facing estimated maintenance

costs of about \$5 million, the district could not depend on the fund balance for support. Moreover, district personnel had not received raises for two years, and the board wanted to include raises in the budget planning.

To cover maintenance costs and personnel raises, the district needed to trim the current budget by approximately \$2 million, or 5% of the typical Marshall budget of about \$40 million.

Eating the Elephant

District officials decided to bring in a team of experts to review the practices and working policies of the PEIMS (Public Education Information Management System) department to confirm that the school district was capturing every available state dollar to which it was entitled.

As the search began for the \$2 million, the administration decided to “eat the elephant” by attacking the task in smaller steps. Administrators developed a three-month plan, whereby departments and campuses were evaluated with regard to personnel and cost savings.

September: Review all stipends and meet with retire-rehire employees. The administration reviewed all stipends to determine (1) whether they were consistent with those of other school districts, (2) whether the stipends were necessary, and (3) whether the work was actually being performed.

They also looked at the employees who were eligible for retire-rehire status through the Texas Retirement System to determine whether there were any opportunities to decrease costs.

October: Evaluate all departments for extra personnel, teacher-student ratio on elementary campuses, and all campus clerical and auxiliary positions. With student enrollment on the decline for several years, the school district and campuses could not continue to operate as they had when they enrolled hundreds more students.

Administrators evaluated every position in every department in the district with regard to *wants* versus *needs*. They discussed open positions and whether to fill them or whether other personnel could absorb those responsibilities.

Human resources officials studied master schedules and class sizes at the elementary school campuses to determine whether they were overstaffed.

Every clerical position in the district was evaluated to verify its necessity.

November: Review the master schedule of the secondary campus to evaluate class sizes and all central administration positions. As had been done with the elementary review, the secondary

campus’s master schedule and class sizes were evaluated to determine whether the campus was overstaffed. Human resources reviewed all administrative positions for compliance with guidelines.

Staffing and Stipends

On the basis of the results of the personnel evaluations, district administrators and the school board quickly determined that the salaries for many positions were higher than they should have been. They decided to leave the compensation for those positions at the same level until the next contract year. At that time, the compensation would be decreased, which they explained to the employees who would be affected.

Administrators evaluated the stipends and eliminated those that were considered “fluff” for the following budget year.

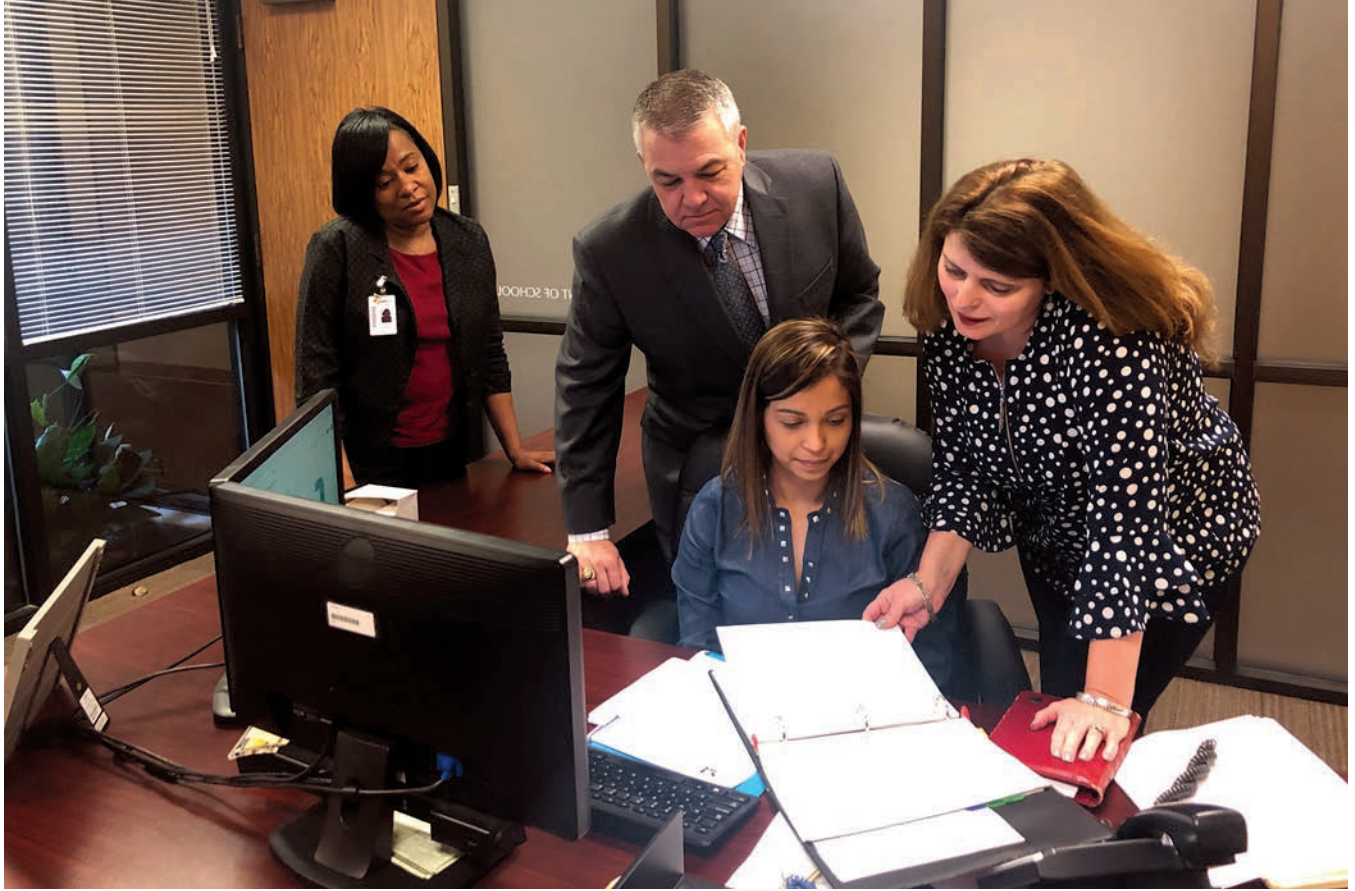
The administration also discovered that several stipends were in name only and little to no work was being performed to earn the additional pay. Administrators evaluated the stipends and eliminated those that were considered “fluff” for the following budget year. The district also discovered that in some cases more than one teacher received a stipend for the same responsibilities, for example, department heads and the lead teacher on the secondary campuses.

By the end of the staffing and stipend evaluation, the district had identified savings of \$109,125.

Retire-Rehire Employees

Faced with teacher shortages years ago, Marshall ISD began hiring eligible teachers who were already in the Texas Retirement System. In Texas, a retired teacher who returns to the classroom can receive a full-time teacher’s salary and continue to earn retirement. However, the retire-rehire employee is responsible for paying surcharges and insurance adjustments.

Administrators discovered that because the district had no clear policy or administrative guidelines regarding the hiring of retired teachers, many—but not



Marshall Independent School District personnel took a in-depth look at everything from stipends to staffing guidelines.

all—rehired retirees had negotiated various types of agreements so the district paid most or all of their surcharges and insurance. Little consistency existed regarding retire-rehire employees.

An administrative guideline was added stipulating that beginning with the next school year, all retire-rehire employees must pay their own surcharges. This change was conveyed to all the district retire-rehire employees. The new policy saved the school district another \$102,685.

Those two adjustments alone saved Marshall ISD a future savings of \$211,810, which was just over 10% of the ultimate goal of \$2 million.

Staffing Issues

After the October evaluation of departments and teacher–student ratios, district leaders decided not to fill the recently vacated student services director position. Instead, the superintendent and the assistant superintendent for curriculum and instruction would absorb that position’s job responsibilities. District leaders also agreed that the responsibilities of a vacant position in advanced academics could be divided between two employees in the curriculum department.

Another position was eliminated on the basis of enrollment. One campus had maintained its enrollment numbers during the 2017–2018 school year and was close to the staffing guidelines. District officials decided to hire an additional assistant principal if the principal could find a Spanish-speaking certified administrator. However, attendance decreased on that campus for the 2018–2019 school year, so the district decided not to add that position.

That decision, combined with the other two personnel reductions, generated a savings of \$227,499.

When district administrators began to look at class sizes, they found a savings opportunity for the 2019–2020 budget, as well as some immediate chances to decrease the personnel budget. They determined not to fill two posted vacancies, thus creating an immediate savings of \$87,000. That savings allowed the transfer of two other teachers into positions where they were needed. In both cases, those two teachers had 16 students in their classes, so those students could be moved to other classes without exceeding the teacher–student ratio of 1 to 22.

Another vacancy was absorbed because of low enrollment at one grade level, which saved the school district another \$43,700.

By evaluating elementary school teacher–student ratios and making necessary adjustments, Marshall ISD cut \$273,000 from the 2019–2020 budget and also found immediate relief of \$142,300 in the 2018–2019 budget.

The evaluation of campus and clerical positions found inconsistencies, which required updated staffing guidelines. The school district is allowing the campus principals to make the final staffing decisions on how to use their allotted positions.

The total savings for the October portion of the evaluation was \$500,499. Adding that amount to the projected amount from the September evaluation resulted in \$712,309, or about 35% of the goal.

Mastering the Schedules

The November evaluation involved reviewing the master schedule of the secondary campuses and all administrative positions. The experts determined that the administrators had reviewed all administrative positions at all other departments and campuses. They anticipated finding the greatest individual opportunity for savings here.

Arranging the schedule evaluation for November gave class enrollments time to stabilize and all scheduling adjustments to be finalized. Marshall High School's enrollment had been declining for several years for various reasons. Although the highest enrollment was almost 2,000 students, the current enrollment is just over 1,400. The initial concern was that the high school was continuing to operate as if it had 1,900 students.

In determining the needs at the high school, the district administration used the following staffing formula:

$$\frac{\text{Courses Taken} \times \text{Student Projection}}{\text{Courses Taught} \times \text{Students per Class}}$$

For the 2017–2018 school year, Marshall High School had 94 teachers on the master schedule. The staffing formula indicated that 67 teachers were sufficient. Allowing five to seven teachers for specials, as well as

To the delight of the school board, the administration had found over \$2 million in savings.

some coaching assignments, the estimated number was 20 fewer teachers. The projected savings just at the high school was approximately \$1.1 million.

Final Determinations

At their December meeting, the school board and administrators discussed the findings, reviewed spreadsheet data, and considered possible next steps for each area reviewed.

The final step in the salary control and personnel evaluation was to meet with the Marshall ISD Board of Trustees and present all of the information that the administration had obtained.

To the delight of the school board, the administration had found over \$2 million in savings—the number necessary to balance the 2018–2019 budget and give at least a 3% raise to district employees.

This project not only was necessary to present a balanced budget, it also became a passion for the administrative team that worked on it each week. The district's savings result in more money being funneled back to the students, which is why we are here. For every hard line the district has had to take means hard lines are being taken for the students and for their future.

Jerry Gibson is superintendent of Marshall Independent School District, Marshall, Texas. Email: gibsonje@sbcglobal.net

SCHOOL BUSINESS FLASHBACK

"If ever there was need for effectiveness and efficiency in the expenditure of public funds, it is today! High costs accentuate leaks and extravagances. The increasing demand for service with ever greater complexity of community and nation-wide organization requires economical solution of the problems to be met.

"How can we find the answers? Most certainly not by dreaming up solutions in the cloistered seclusion of a study or of our private offices. Contact with the problems and with those acquainted with them, provides the means."

This quote from Arthur A. Know, ASBO International president in 1949, illustrates the point that the variety of issues school business officials must confront on a daily basis has remained steady for decades.

THINKING OF PREPARING A CAFR?

Time to get your docs in a row...

Elevate your district's financial reporting above the minimum requirements with a Comprehensive Annual Financial Report (CAFR). Use ASBO International's resources for valuable guidance, and apply for a Certificate of Excellence in Financial Reporting (COE).

It's never too early to start collecting:

- ✓ **DEMOGRAPHIC INFORMATION**
- ✓ **SCHOOL DISTRICT ACHIEVEMENTS**
- ✓ **ECONOMIC CONDITION AND OUTLOOK**
- ✓ **OPERATING INFORMATION**



- Talk to your auditor.
- Budget for CAFR and COE submission.
- View the COE checklist and instructional videos: asbointl.org/COEresources

Contact COE@asbointl.org for more information.



Strategies for
getting off on the
right foot.

Transitioning to a New Boss

By Nan Wodarz, Ed.D.

One of the mistakes many of us make in our initial days with a new boss is thinking that we know—or taking someone else's word about—what the new supervisor thinks, expects, and values. Rather than make assumptions, consider these strategies:

Maintain a good attitude. The one thing we have complete control over is our attitude. When encountering change of this magnitude, be optimistic and positive. Although everyone else wants to lament the fact that change has occurred, you can choose to believe the best about the new boss and give the benefit of the doubt.

Temper your expectations. Change is inevitable, so accept it. Your new supervisor will want to introduce their way of doing things. This is the time to be supportive and to suspend judgment. Take a wait-and-see attitude rather than being oppositional.

Help decrease the learning curve. If you can find ways to ease the new boss's transition to the position and bring them up to speed on current projects, you will prove yourself to be an invaluable part of the management team.

Determine style. Learn the supervisor's management style and adapt to it. The most effective way to do this is with an actual conversation to learn what they value most in interactions with others. Ask about preferences in management styles.

Excel. Transitions can be your time to shine. Make sure that you are on your A game and that everything you do and say is polished and professional. Remember, you are only as good as your last success. Look for new wins.

Learn what metrics matter. Each of us determines success in a different way. During the first weeks with a new supervisor,

make a point to understand what your boss wants formally measured, tracked, and reported, as well as what they want monitored informally.

Determine the decision-making process.

Each leader makes decisions in a different way; some delegate decision making and others micromanage. Before this issue becomes uncomfortable, find out where on that spectrum your boss falls and what exceptions might cause that process to change.

Communicate. Communication is where everything works well or it all falls apart. Early on, you must learn to understand and adapt to your boss's preferred communication modes, manner (formal or informal), and frequency.

Ascertain how to handle disagreements and constructive feedback.

Your new supervisor might not welcome challenges to authority. They might welcome feedback, but only in one-on-one situations rather than in front of the team. Clarify how they want to handle situations in which you disagree with them and whether they are willing to accept constructive feedback.

Realize that it's not about you. Some have a tendency to make sure the new boss knows how awesome they are. Your first impression should convey that you are a team player and that you are dedicated to the goals of the entire team.

Starting Anew

Instead of fretting over new management, embrace it as a chance to grow personally and professionally.

Nan Wodarz is an administrator at Valwood School in Hahira, Georgia. Email: nanwodarz@gmail.com



EARN \$2,000 TO ATTEND THE ANNUAL CONFERENCE & EXPO



18 school business officials who have been in the profession for

5 years or fewer will earn

\$2,000 toward travel and registration to experience the professional development event of the year!



ASBO INTERNATIONAL
ANNUAL CONFERENCE & EXPO
NATIONAL HARBOR, MARYLAND
OCTOBER 25-28, 2019

APPLY OR NOMINATE BY JUNE 1
[**asbointl.org/Scholarship**](http://asbointl.org/Scholarship)



Best practices
to consider in
emergency
management plans.

Managing School Crises: Before, During, and After

By Charles J. Russo, J.D., Ed.D., and David Dolph, Ph.D.

From school shootings, to bomb threats, to natural disasters, to deaths in the school community, education leaders are challenged to maintain “business as usual” while operating in crisis response-crisis management mode.

The Federal Commission on School Safety recent released a 170-page report on best practices and recommendations to prevent, protect and mitigate, and respond and recover.

The report states that factors that contribute to the effectiveness of security and emergency management efforts at schools include the establishment of a security management team; the development of a school safety community; the conduct of school risk assessments; and the existence of security and emergency operations plans.

This column draws from some of those recommendations and offers strategies for school business officials and other education leaders to consider before, during, and after an emergency situation.

Before an Emergency

Crisis management plans and policies should be comprehensive and actionable, based on risk assessments, and address a wide array of scenarios. They should include protocols for reporting intruders in the school, for evacuating buildings, and for remaining in secured locations on campus.

Anonymous activity reporting programs should be in place to encourage and facilitate the reporting of suspicious activities and other concerning behaviors.

Policies should include establishment of a crisis management team at each building and detail each member’s responsibilities during an emergency.

School leaders and local police and government agencies should review school crisis management plans and discuss the roles of other agencies during emergencies.

Because the media plays an important part in communicating to the public, the district should have a media plan as part of their crisis preparation plan. A district employee should be designated to oversee the plan and its implementation.

**All school personnel must
play a part in ensuring
student and staff safety.**

Education leaders should regularly review school safety policies at faculty/staff meetings and post them on school websites so that teachers and parents are familiar with school and district policies and plans.

All school personnel must play a part in ensuring student and staff safety and should be trained in emergency procedures. It would also be wise to have faculty and staff walk through emergency procedures with students to familiarize or review their expected responses.

During Crises

When an emergency arises, building-level officials should notify the superintendent’s office and follow designated procedures, including contacting local first responders and other governmental agencies.

The superintendent’s office should alert the designated spokesperson to communicate with the media and the community. The superintendent’s focus should be on the safety of staff and students rather than on answering media questions.

School officials should provide frequent updates to teachers, staff, students, and



parents; establish a crisis room for students who are particularly upset; and release students who may be discharged during the day to parents or other authorized individuals identified on signed parental release forms.

Post-Crisis Practices

Generally, as soon as is reasonably practical after resolving crises, education leaders should:

- Provide counseling services for students and staff who are having difficulty coping with the crisis.
- Designate a staff member to work with the family of students and/or staff members who were directly affected.
- Conduct meetings with staff to assess how the crises was handled.
- Acknowledge first responders and others who helped.

With regard to staff in particular, education leaders should:

- Allow teachers to opt out of reading announcements or discussing the crisis with their classes if they are not comfortable doing so.
- Offer teachers relief time during the day to deal with their own grief. Staff should feel free to talk with each other and counselors to process their own concerns.
- Provide teachers with guidelines

for dealing with crises in their classrooms. These guidelines should focus on dealing with their own feelings of sorrow and/or anger; being patient with students and colleagues; and adapting instructional methods and materials in a manner sensitive to student needs.

Long-term Planning

Important points to keep in mind when engaged in long-term planning are to:

- Meet with teachers and other staff to update them on how school populations are adjusting while addressing symptoms of post-traumatic stress syndrome.
- Have counselors schedule large-group/classroom sessions, if needed, to discuss students' reactions to crises. Sessions should also address how students at different cognitive and affective levels internalize crises.

- Consult with officials in neighboring districts to share and evaluate their policies so that leaders can learn from one another.
- Meet with their crisis teams before the opening of each school year.
- Review, and update, plans annually even if the process simply includes reading through and discussing existing plans. This allows leaders to take a step back and consider the effectiveness of existing plans; Moreover, board attorneys should be involved in such discussions to help to ensure that revised plans meet any recently adopted state and federal standards.

Education leaders need to be mindful that while having plans in place does not guarantee that they will escape liability, the converse is that not having policies in place increases the risk of liability.

Well-thought-out policies can help to reduce the risk of injuries and deaths, lessen concerns over financial liability associated with the expense of non-compliance, and most importantly, help to keep faculty, staff, and students safe.

Charles J. Russo is content area leader for ASBO's Legal Aspects Committee, Joseph Panzer Chair of Education in the School of Education and Health Sciences (SEHS), director of SEHS's Ph.D. program in educational leadership, and research professor of law in the School of Law at the University of Dayton, Ohio. Email: crusso1@udayton.edu

David Dolph is assistant professor and chair of the Departmental Administration in the SEHS at the University of Dayton and a former superintendent. Email: ddolph1@udayton.edu

INDEX OF ADVERTISERS

American Fidelity	inside back cover
DecisionInSite	page 18
Follett	back cover
Harris School Solutions	page 19
ROUSH CleanTech	pages 22-23

8 STEPS FOR CREATING A COMPREHENSIVE TARGETED VIOLENCE PREVENTION PLAN

Recommendations from the Federal Commission on School Safety

STEP 1: Establish a multi-disciplinary threat assessment team. Threat assessments are best performed by multi-disciplinary teams that include highly trained professionals from a variety of different disciplines (e.g., teachers, administrators, school resource officers, school psychologists, guidance counselors). The team will conduct the threat assessments, implement crisis prevention when needed, assess the student's potential for violence, and develop intervention and management strategies to mitigate that risk.

STEP 2: Define behaviors to include those that are prohibitive and concerning. *Prohibited behaviors* should trigger immediate intervention. These behaviors can include, but are not limited to, intimidation, threats, harassment, bullying, and carrying weapons on school property. *Concerning behaviors* may indicate the need for a threat assessment. These behaviors can vary in nature, but may include sudden or dramatic changes in mood and appearance or a decline in school performance. There should be a low threshold of concern so that the plan addresses a continuum of concerning behaviors, not just direct threats or behaviors indicative of planning for an attack.

FAST FACT: *In recent surveys, 34% of youth reported being cyberbullied in their lifetime, and bullying has been cited as a contributing factor in cases of extreme retaliation, including school shootings.*

STEP 3: Establish and provide training on a central reporting system. This can include an online form on the school website, email address, phone number, smartphone application, or other mechanism. It is also important to ensure the reporting tool is continually monitored, each report is followed up, and that it allows individuals to report anonymously. Programs and policies must be put into place that promote a climate that ensures those reporting feel safe in their concern and break down the code of silence.

STEP 4: Determine the threshold for law enforcement intervention. Although the majority of cases will be handled using school or community resources (e.g., mentoring, counseling, tutoring, and social or family services), some will require law enforcement, especially if there is a safety risk.

STEP 5: Establish replicable threat assessment procedures. These procedures include practices for maintaining documentation, identifying sources of information, reviewing records, and conducting

interviews with an emphasis on rapport building. Procedures should include the following investigative themes to guide the assessment process: *Motive, Communications (unusual or concerning), Inappropriate Interests, Weapons Access, Stressors, Emotional and Developmental Issues, Desperation or Despair, Violence as an Option, Concerned Others, Capacity to Organize an Attack, Pre-Attack Planning Behaviors, Consistency Between Students' Actions and Statements, and Protective Factors.*

FAST FACT: *It is estimated that depictions of violence are present in 90% of movies, 68% of video games, 60% of television shows, and 15% of music videos.*

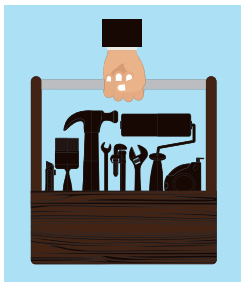
STEP 6: Develop risk management options. Threat assessment teams should develop a set of risk management options that can be implemented once an assessment is complete. Based on the information developed by the team, an individualized management plan can be created to mitigate any identified risks. Other components of management include notifying law enforcement if an attack is imminent, ensuring the safety of potential targets, creating a situation less prone to violence, and reducing the effect of stressors.

STEP 7: Create and promote a safe school climate. School climates should facilitate a culture of safety, respect, trust, and emotional support, where open communication is encouraged, school staff intervene in conflicts and bullying, and students feel empowered to share their concerns.

FAST FACT: *In 2016, 57% of public schools reported the presence (at least once a week) of security staff.*

STEP 8: Provide training for all stakeholders. Recipients of the training should include faculty, staff, and administrators; students; parents; and school resource officers and local law enforcement. Topics covered by the training might include how to recognize and report concerning behavior, suicide prevention, conflict resolution, and de-escalation techniques.

You can download the full report at <https://www2.ed.gov/documents/school-safety/school-safety-report.pdf>



Ideas, resources,
and tips for school
business officials

Student Privacy, Technology, Public Opinion and More

Does Your State Protect Student Privacy?

The Network for Public Education and the Parent Coalition for Student Privacy collaborated to create The State Student Privacy Report Card to provide a snapshot of the legal progress made by the 50 states and the District of Columbia to protect students' privacy since 2013.

The report assigns a grade to each state based on points and grades in seven categories: parties covered and regulated; transparency; parental and student rights; limitations on commercial use of data; data security requirements; oversight, enforcement and penalties for violations; and other provisions.

No states earned an A overall. Colorado earned the highest weighted average grade of B. Three states—New York, Tennessee, and New Hampshire—received a B-. Eleven states received an F. Find out where your state stands. Download the report at www.studentprivacymatters.org.

Technology and Learning

Despite the emphasis schools place on digital learning, many students still lack access to technology at home and in the classroom, according to a study from Schoology.

The State of Digital Learning in K–12 Education study of nearly 9,300 K–12 teachers and administrators in the United States—most with more than 10 years of experience in education—looked at areas such as obstacles to student learning, challenges teachers face, the role and impact of technology, digital citizenship, emerging edtech trends, and effective instructional approaches. Key findings include:

1. The challenges that educators face include a lack of infrastructure, budget, or lack of student access at home—all

of which are beyond a teacher's control. Around 35% of teachers said that student access to technology was a major digital learning challenge, while nearly a third of administrators listed technological infrastructure as a top digital learning challenge.

2. Nearly 38% percent of teachers surveyed said juggling multiple tools for teaching and learning is a challenge. At some point, incorporating too many tools without a strategic approach to doing so can become more burdensome than helpful.
3. Internet safety is a concern. More than 34% of respondents cited Internet safety as the number one digital citizenship concern, yet an equal number of respondents do not have a digital citizenship program in place or are not encouraged to discuss the topic with students.
4. Social media is finding its place in the classroom. About 40% of schools allow social media for educational purposes only, while nearly 20% have an openly permitted social media policy.
5. Digital learning needs to extend beyond the K–12 classroom and into teacher PD opportunities. Most PD courses are still conducted via in-person workshops, with 60% of schools and districts relying on periodic workshops.

You can view and download the study at www.schoology.com/state-of-digital-learning.

The Complexity of Teacher Shortages

Is the shortage of teachers a national problem? In “Nuance in the Noise: The Complex Reality of Teacher Shortages,” Kaitlin Pennington McVey and Justin Trinidad analyze U.S. Department of Education data

on teacher shortages between 1989 and 2017 and assert that there are significant differences in teacher shortages by subject area and across states due to “a mismatch between teacher supply and demand.” They offer recommendations for addressing shortages.

Download the full report, published by Bellwether Education Partners, at https://bellwethereducation.org/sites/default/files/Nuance%20In%20The%20Noise_Bellwether.pdf

Public Survey Says

The 12th annual Education Next survey of public opinion, administered to more than 4,600 adults in May 2018, uncovered some interesting results regarding the public’s thoughts about education. For example:

Teacher salaries. Among those provided with information about average teacher salaries in their

state, 49% of the respondents said the teachers should get a pay raise.

School spending. Among those provided with information about current spending levels in their local school districts, 47% said that spending should increase.

School vouchers. A 54% majority of the public supports “wider choice” for public school parents by “allowing them to enroll their children in private schools instead, with government helping to pay the tuition.” African American (56%) and Hispanic (62%) respondents were more in favor of vouchers for low-income families than were whites (35%).

Charter schools. After a decline in support in 2017, public support for charter schools climbed by 5 percentage points last year, to 44%, with only 35% opposed.

Immigration. Only 30% of respondents favored “the federal government providing additional money to school districts based on the number of immigrant children they serve.”

In areas where the proportion of foreign-born residents was above the national median, 37% of respondents endorsed the proposal, but that support dropped to 22% among those living in areas with fewer immigrants.

Read more about these results as well as public opinion about discipline, Common Core, and teachers’ unions in the Winter 2019 online issue of *EducationNext*. Go to www.educationnext.org.

Coming in April
School Business Affairs:
Managing People and Culture

#ASBOcate for your school district’s needs.

Access legislative information and advocacy tools at asbointl.org/Legislative.

ASB NETWORK
Legislative **PEER-TO-PEER KNOWLEDGE**

ASBO USA
@ASBOUSA
The Association of School Business Officials has a **LIVE UPDATES #ASBOcate** page. Follow/Tweets not endorsements. 156 Photos and videos

Legislative Resources
Advocating for Quality Education
As a school business leader you advocate for your students to ensure they have a quality education and ample resources to maximize their potential. As your advocate and an advocate of the school business profession, ASBO International is here to help you manage education law compliance and ensure your school is in the best possible financial position.

INFORMATION AND TOOLS

SAVE THE DATE!
2019 Legislative Advocacy Conference
July 8–10 • Washington, D.C.

Spotlight on Rodney Cook



When Rodney Cook took his first position as accountant at a school district in eastern Utah, he was sure it was a temporary phase in his business career. He quickly came to appreciate the variety inherent in the work of a school business professional. Thirty-seven years later, he is the board-

appointed business administrator for Box Elder School District in the northwest corner of the state, a position he has held for five years. Cook says, "I love feeling like I'm part of such a great endeavor. I'm always revitalized when I go out into the schools and see the kids."

With a budget of \$110 million and an enrollment of 11,700 students, Box Elder ranks 13th in enrollment and fourth largest in land area in Utah, with 25 schools located in an area spanning over 5,700 square miles. Most of the population is concentrated in two cities, but there are school sites 120 and 160 miles from the district office, including Grouse Creek Elementary, which currently has an enrollment of five students.

Cook has enjoyed being able to wear many hats, covering purchasing, payroll, accounting, accounts payable, school lunches, risk management, and more. He organized and implemented a formal purchasing process and wrote a procedural manual for his first district. Cook

says his greatest challenge has been taking his nose out of the books and learning how laws are made and adapted, and how to communicate with policy makers.

In the state with the lowest per-pupil spending rate in the nation, Cook prides his district on being efficient. As Utah has grown more diverse like the rest of the nation, the financial challenges that go along with differing needs among students are becoming apparent. Cook's current objective is to show legislators how the changes in the district's population challenge their ability to do less with more. He does commend the state for maintaining the remote, small schools that are a part of Utah's culture.

When preparing the district budget, Cook follows ASBO International's Meritorious Budget Award model budgets. A recent president of Utah ASBO, Cook says ASBO International and its affiliates foster a philosophy of cooperation. He attends the Annual Conference & Expo when he can and always finds something valuable in the presentations.

Cook encourages newer colleagues to interact with other business administrators through ASBO. "This network is one of the most valuable things we get, where I've learned how to manage issues. As a general rule, this stuff isn't taught in business classes. It's a specialized field. Let the people who have gone before you help you."

We at ASBO International are grateful to our
Strategic Partners for helping us do what we do,
and for helping school business officials do what they do.

AMERICAN FIDELITY
a different opinion



 **Horace Mann**
Founded by Educators for Educators

COMMITTED TO LEARNING
One Student at a Time
Office DEPOT

RICOH
imagine. change.

 **Security Benefit**
TO AND THROUGH RETIREMENT


VIRCO
Equipment for Educators™

VOYA
FINANCIAL

Each Strategic Partner sponsors a valuable ASBO International program, ensuring our members have access to timely information, career-enhancing education, and professional recognition.

You deserve a specialist.

Budget. Budget. Budget. We know what keeps you up at night. Tightening budget dollars can feel at odds with increased performance expectations. You search for partners who can ease your workload and worry. For more than 55 years, American Fidelity has been walking in step with leaders just like you. So, when seeking another point of view in employee benefits solutions, consider American Fidelity for a different opinion.

Help is here.

- Strategic Voluntary Benefits
- Year-Round Enrollment Support
- Employee Benefits Education

9000 Cameron Parkway
Oklahoma City, OK 73114
800-654-8489
americanfidelity.com



AMERICAN FIDELITY 
a different opinion

 **Follett** Pre-owned Textbooks

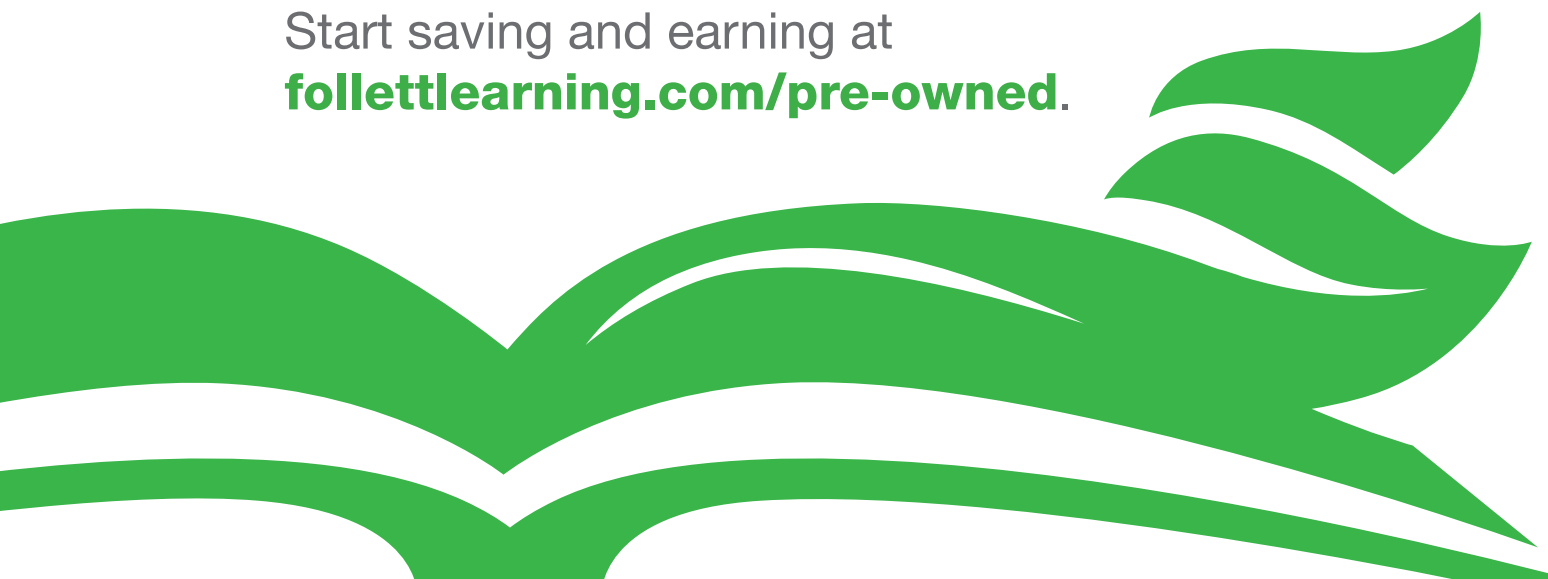
IT PAYS TO BE GREEN

What's good for the environment
is good for your budget.

Follett can help you stretch your budget in two ways:

1. Save BIG! Purchase certified pre-owned textbooks and workbooks and save off publisher prices.
2. Earn CASH! Sell your extra or obsolete books with our Textbook Buyback Services.

Start saving and earning at
follettlearning.com/pre-owned.



dif·fer·ence- mak·er

/'dif(ə)rəns/ /'mākər/

One who has an impact or effect;
One who brings about change.

What does it look like for school business officials to go
above and beyond the day-to-day to serve students?



ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL

PROUD SPONSOR





EAGLE AWARDS

ASBO International honors school business professionals who stop at nothing to be change-agents for the students in their district and beyond.

If you're a **difference-maker** who exhibits these **five qualities**, don't let your story go untold.

Whether you're guiding your district through tough budget cuts, spearheading a new project for your schools, or volunteering your time to serve the profession, you're mastering the role of a strong leader. Your unique leadership philosophy has taken shape from your desire to see students succeed, which has fueled you to think and lead beyond the boundaries of your school system.



A photograph showing several hands raised in the air, suggesting a crowd or a group celebrating. The hands are of different skin tones, and one hand has a ring. The background is blurred, showing some green and blue lights.

ACHIEVEMENT

2

You aim for the highest standards to give your school district good standing in the community, and when you reach those standards, you continue to find areas in which to grow and new goals to pursue. You're driven to push yourself and your team to excellence—and it shows in your accomplishments.

Even in the midst of the most stressful seasons school districts face, you not only show up to work, ready to give your all, you weave your work into weekends and evening hours, checking on projects, participating in community functions, and gaining perspectives beyond your everyday vantage point. If there's a roadblock preventing student success, you won't stop until you've found a workaround.



This quality is simple: Your peers look to you for advice and others seek to emulate the success your school system has seen. Your voice speaks for students, so you make sure those who need to listen hear you loud and clear.





5 HUMILITY

You often deflect recognition from yourself to shine the spotlight on your team, but you're always the first to take responsibility when something goes wrong. Your servant's attitude shines through your daily tasks, and that's what makes you a great leader for others to follow.

Do these qualities describe you or a colleague?

If so, share your story by applying for ASBO International's Eagle Awards, or nominate a colleague to apply!

RECIPIENT BENEFITS

- A scholarship to present to a high school senior from the recipient's district: \$2,500 for Distinguished Eagle Award recipients and \$5,000 for the International Eagle Award recipient.
- A complimentary registration for ASBO International's 2019 Annual Meeting & Expo.
- Complimentary registration and travel to the 2020 Eagle Institute.
- The prestigious crystal Eagle Award.
- The elegant Eagle Award pin.
- Recognition in ASBO International publications and media.

APPLICATION REQUIREMENTS

- Eagle Award candidates must be active professional members of ASBO International.
- Candidates must be full-time school business officials as of June 1, 2019.

Visit **asbointl.org/EagleReqs** to learn more

APPLY ONLINE BY JUNE 1!
asbointl.org/EagleAwards