

TREASURER SEARCH PROFILE

Bethel Local

Tipp City, Ohio

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Prepared for the Board of Education

By



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TREASURER SEARCH PROFILE REPORT

April 26, 2018

This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period April 12, 2018 through April 20, 2018. The profile development questionnaire form was used to provide a framework for reporting the information compiled in this report. In accumulating the data used in this report K-12 Business Consulting team also sought from respondents their opinions, recommendations and general comments with respect to preferred candidate characteristics, traits, qualifications and personal demeanor, as well as district strengths, weaknesses, issues and concerns which may have a bearing on future financial leadership strengths for your next Treasurer/CFO.

K-12 Business Consulting sought input from the Board of Education, District Administration, Certified and Support Staff through a survey that was sent out in an e-mail blast. The results of these questionnaires are included in this report.

Broad themes were highlighted in each question area into five (5) response groups (board of education, district administration, certified staff, support staff and community). Under each question in the report the response group's common themes were identified. The first category titled as "Consistent" are comments which were frequently heard from all or nearly all response groups. Comments heard less frequently or only heard in a specific response group are listed under that response group. The responses noted under "Consistent" for any of the response groups are noted with the highest frequency first then descending to less frequently heard. It is important to note that the data is not a scientific sampling, nor should they necessarily be viewed as representing a majority opinion of those interviewed in the response group.

K-12 Business Consulting and the Ohio Association of School Business Officials would like to commend the Board of Education for its efforts to include many key stakeholders in the development of the Treasurer Search Profile. Many respondents expressed positive feelings about being involved in this process and the opportunity to help shape the Bethel Local School District. We would also like to thank Mrs. Virginia Potter, Superintendent, for handling the profile meetings and the emails of the survey.

STRENGTHS OF THE DISTRICT

Question #1: What do you consider to be the two or three most significant strengths of the district?

CONSISTENT

- Community support and involvement
- Quality teachers, support staff and administrators

BOARD OF EDUCATION

- Educational opportunities – in all areas
- Extra-curricular opportunities

DISTRICT ADMINISTRATION

- Good kids, deep in tradition
- Curriculum and instruction, moving to 21st century skills
- Good strong property values and commitment to the township
- Location of district, easy to get to cities for other amenities

CERTIFIED STAFF

- Teachers, support staff and administrators that care about our students and are curriculum focused
- Innovative
- Pride

SUPPORT STAFF

- Fairly strong socio-economics in the community
- Small school
- Focused on students

COMMUNITY

- School is the center of Bethel
- Local leadership willing to give their time and talents to the school
- Academics are good

IMPORTANT ISSUES FACING DISTRICT

Question #2: What do you consider to be the two or three most important issues facing the district?

CONSISTENT

- Growth in the school district for housing and student population
- Financial Stability

BOARD OF EDUCATION

- Leadership stability – both superintendent and treasurer
- Voter fatigue as to levies

DISTRICT ADMINISTRATORS

- Prioritizing needs of school vs. tradition for facilities, staffing and initiatives
- Old athletic fields that need to be replaced
- Union contract, staffing concerns
- Rebuilding trust among all stakeholders

CERTIFIED STAFF

- Need for new track and athletic facility plan
- Effective communication between different parts of the schools

SUPPORT STAFF

- Re-establishing trust and confidence between the administration, school board and the community
- Fear and resistance to change
- No room for new students

COMMUNITY

- Academic rigor at the high school needs to be increased
- Trust along with communication and transparency
- Building issues – capacity for new students

CHARACTERISTICS OF NEW TREASURER

Question #3: Please tell us your two or three characteristics that you think the Board should look for in a new Treasurer.

CONSISTENT

- Experienced and knowledgeable in many areas of school finance
- Team player – works well with others

BOARD OF EDUCATION

- Someone who communicates with all stakeholders
- Someone who stands firm when needed

DISTRICT ADMINISTRATION

- Forward thinking
- Personable, kind and out-going
- Best interest of students
- Understanding of state and federal programs, such as EMIS, tuition reports and CCIP
- Willing to educate staff, administration and secretaries and treat others as professionals

CERTIFIED STAFF

- Fiscal leader and adviser who provides sound financial guidance
- Good communication and collaborative skills
- Integrity, dependable and honest

SUPPORT STAFF

- Someone who is determined to do the right thing in the long run
- Strong personality – be able to hold their ground
- Approachable, amenable and friendly
- Able to teach changes that are made to all stakeholders
- Budget processes that are explained and followed

COMMUNITY

- Able to do what is right, strong integrity
- Fiscal responsibility

- Able to project revenue and growth
- Someone able to stand up for themselves

TREASURER CHARACTERISTICS BY RANKING

CRITERIA	BOE	DISTRICT ADMIN	SUPPORT STAFF	CERTIFIED STAFF	COMMUNITY	COMBINED
Ability and willingness to deal fairly with faculty, staff, students and parents	5	2	3	2	1	2
Expertise in using operating system software	7	8	8	8	9	8
Expertise in design and implementation business office procedures	9	10	10	9	10	10
Effective at communicating district finances in both written and verbal form	1	5	5	6	5	5
Successful experience as a Treasurer/CFO or assistant treasurer	4	4	1	3	2	3
Experience with school financial management	2	1	2	1	4	1
Knowledge of Ohio laws and legislation that concern school districts	6	3	4	4	3	4
Organizational and management skills	3	7	7	7	7	7
Personal involvement and interest in the district programs	10	9	9	10	8	9
Experience in state and federal financial reporting	8	6	6	5	6	6

1= MOST IMPORTANT

10=LEAST IMPORTANT

RANKING OF TOP AND BOTTOM FIVE (5) IMPORTANT CHARACTERISTICS ALL GROUPS

RANK - TOP 5 CHARACTERISTICS

- 1 Experience with school financial management
- 2 Ability and willingness to deal fairly with faculty, staff, students and parents
- 3 Successful experience as a Treasurer/CFO or assistant treasurer
- 4 Knowledge of Ohio laws and legislation that concern school districts
- 5 Effective at communicating district finances in both written and verbal form

RANK – BOTTOM 5 CHARACTERISTICS

- 6 Experience in state and federal financial reporting
- 7 Organizational and management skills
- 8 Expertise in using operating system software
- 9 Personal involvement and interest in the district programs
- 10 Expertise in design and implementation business office procedures

It should be noted that regardless of the rankings all of the items represented by the characteristics on the previous page, each of these characteristics are important to the long term success of the new Treasurer/CFO of the district. The ranking helps identify the most important characteristics desired at the time of the survey.

SUMMARY

The information gathered from the surveys reflect a fairly consistent picture of the strengths, important issues facing the district, as well as the characteristics desired of the new Treasurer/CFO for the Bethel Local School District. The respondents were clear that this is a very important person to the overall health of the district serving an integral role in the day-to-day operations of its schools as well as a key player in long term strategic planning and problem solving.

The overarching issue raised by all groups was the next Treasurer/CFO should have experience with many areas of public school finance. This individual must be able to not only manage the district finances but also be able to manage the day to day operations of the treasurer's office and staff with confidence, fairness and integrity, but as a team player with the board of education, administration and staff. This person should also be able to lead discussion with forward-thinking that will direct the financial stability of the district for the present and the future and not just a number cruncher.

The respondents were very clear that the next Treasurer/CFO will need to have knowledge of the Ohio laws and legislation along with experience with state and federal financial reporting. The way in which the next Treasurer/CFO communicates will need to be in terms/terminology that all stakeholders can understand and can ensure that the community recognizes the district is being fiscally responsible.

With the changes in school funding the next Treasurer/CFO must be willing to be innovative, frugal, visionary and forward thinking on ways to fund the district that are alternative from taxes and state dollars. This person will need to be able to project growth in revenue and students, this may include the changes that the tax increment financing, which is in place, affects these projections. This person will also need to have the ability to be a problem solver as it relates to the financial well-being of the district.

The next treasurer will need to have experience in communicating with many different types of people and in many different situations. With this type of experience the individual must have the knowledge and be able to communicate the information in presentations that are understandable by many different groups whether it be the teaching staff or a booster club. The treasurer must know the audience that they are presenting to and be able to break the information down into understandable data for that group.

It was difficult to capture all the characteristics that respondents were looking for in a new Treasurer/CFO. It is certain that no one person could possibly embody all that was mentioned for every

attribute. However, in reconciling the many concerns and characteristics sought in a Treasurer/CFO for Bethel Local School District, in addition to the major areas noted above, the respondents recognize the need for an honest person with high integrity in dealing fairly, someone that is trustworthy beyond reproach, being approachable as well as showing mutual respect when dealing with all stakeholders.

The district faces many of the same challenges faced by most Ohio school districts and many that are unique to Bethel Local School District; however, they are the challenges that will be of interest to the right Treasurer/CFO candidate. We believe we will find the right candidate(s) who have the attributes outlined above, possess the skills and energy needed to address the issues and concerns expressed by respondents, and, who will be eager to be a part of the Bethel Local School District for many years.