

Securing Top-Notch School Finance Leaders:

Strategies that Work

MASC/MASS Joint Conference, November 2024

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Who we are & what do we know?

Three Past Presidents

2012: Matthew J. Gillis, 6 districts, 23 years SBO, 3 years MTRS

2020: Cynthia D. Mahr, 3 districts, 23 years SBO, 8 years Commonwealth of Mass. Depts.

2022: Mary Ellen Normen, 5 districts, 27 years SBO, 6 years Town Treasurer/Collector

And... MPA Grads

Introduction

- Importance of having exceptional financial leadership in school districts
 - Value added for exceptionally short money
- Impact on strategic resource allocation and student achievement
 - Experience + Awareness = Better Results
- Recommend being honest with yourselves about filling the “you don’t know what you don’t know” hole in your leadership team

Defining the Role

- Determining the scope of responsibilities for your district's finance leader
- Task and function checklist to clarify needed qualifications
 - Special projects or tasks are very likely to be assigned to this person; if so, put it in the posting.

Creating an Attractive Job Description

- Crafting a compelling job description to attract top candidates
- Determining the appropriate title based on qualifications (CFO, Business Official/Administrator, etc.)
 - Negotiating an appropriate title.
- C-Suite Recruitment: Is your SBO on your Leadership Team Meetings? Why or why not?

Recruitment Strategies

- Leveraging online job boards and professional networks
- Growing your own finance leaders from within the district
- Utilizing search firms/talent acquisition specialists

Interviewing and Selection

- Application screening to identify top financial management talent
- Sample interview questions to assess core competencies
 - Base Interview Question
 - Additional Questions to Consider
 - Job Responsibility Questions
- Interview Committees:
 - Who is included in the interview committee?
 - How many interviews?
 - Have committee members been trained to know the difference between a correct/appropriate response and one that appeals to the audience?

Base Interview Question Set

First Interview Question Set:

1. Could you provide a detailed account of your experience in the administration of school finances, with a particular emphasis on the areas of budgeting, accounting, and cash management?
2. In what ways have you worked with school administrators, instructors, and other staff members to improve the educational opportunities for students?
3. Could you provide an example of a challenging circumstance you encountered in your current role and the way you resolved it?

Second Interview Question Set:

1. How do you remain informed about the most recent trends and best practices in school business administration?
2. In the context of collective bargaining and union agreements, how do you approach decision-making?
3. In what ways does your racial identity and other intersectional identities impacted your role as a leader and educator?

Finalist Interview Question Set:

1. Could you provide a detailed account of your expertise in overseeing a school operations department, which encompasses custodial, maintenance, grounds, and security personnel?
2. In your capacity as a school business administrator, how do you maintain a balance between the requirements of various stakeholders, including parents, instructors, and administrators?
3. Would you be able to provide an example of a complex personnel discipline case that you have encountered and the manner in which you resolved it?

Additional Questions to Consider:

Diversity, Equity, and Inclusion:

1. Would you be able to provide examples of initiatives that you have implemented in your previous roles to promote anti-racism, inclusion, diversity, and equity?
2. How have you ensured that your leadership promotes a culture of inclusion, equity, and diversity within your department, school, or district?
3. What is your strategy for promoting inclusivity and addressing systemic inequalities in educational environments?
4. Describe a scenario in which you effectively navigated diversity challenges within a school environment and the results of your actions.

Best Practice Interview Questions:

1. In the capacity of a school business administrator, how do you prioritize and manage competing demands?
2. In the event that you are hired for this position, what are the most critical actions you would implement during your initial week of employment?
3. What are your objectives and priorities in the process of transitioning to a new administrative role?
4. What is your leadership style, and how might it be perceived by the administrative team and the business office staff?

Community Relations

1. In your capacity as a school business administrator, how do you approach the collaboration with community organizations, realtors, and senior citizen groups?
2. What is your history of organizing and administering school overrides and debt exclusions?
3. In your previous positions, how have you effectively simplified complex school finance topics for new committee members?
4. Could you provide examples from your heritage that illustrate your capacity to effectively interact with a variety of public bodies, including finance committees, parks and recreation, and other municipal committees?
5. What proactive role do you believe the school district should play in the assessment process when addressing property tax rate challenges?
6. Provide an account of your interactions with senior citizen groups, realtors, and community organizations during your previous roles. Describe the importance of these interactions.
7. In your previous positions, how have you achieved transparency and accuracy in financial reporting to establish trust with the public, committees, unions, and colleagues?

8. Please provide an example of a situation in which you were subjected to public scrutiny regarding the facts or data that were presented to the School Committee. Provide a detailed account of how you effectively responded to the challenge and maintained your credibility.

Job Responsibility Questions

School Facility Operations, Planning & Construction:

1. Could you provide an example of a successful experience you have had in the management of a school operations department, which includes custodial, maintenance, grounds, and security personnel?
2. What strategies have you employed in the design of facilities and the construction of schools to guarantee the most efficient and effective results?
3. In the past, how have you worked with school architects, engineers, and construction administrators to successfully complete projects?
4. Would you be willing to elaborate on your experiences collaborating with civil, mechanical, and landscape engineers, as well as construction supervisors, in the context of school architecture?

Financial Planning, Accounting & Cash Management

1. Stakeholder Involvement and Budget Preparation:
 - a. What are the typical measures you take to prepare the annual school district budget, and how do you involve stakeholders in this process?
2. Forecasting and Financial Reporting Transparency:
 - a. What methods do you employ to guarantee that your financial reporting and forecasting are accurate and transparent?
3. Financial Crisis Management:
 - a. Could you provide an example of a severe financial crisis that you have successfully navigated during your professional career?
 - b. What was your role in the crisis, and how was it resolved?
4. Revenue Maximization and Cost Reduction Strategies:
 - a. In what ways have you, as a school business manager, ensured the financial sustainability of the district by maximizing revenues and reducing costs?
5. Experience in Financial Resource Management:
 - a. What is your background in the accounting, management, and investment of a school district's financial resources?
6. Response to a Principal's Unbudgeted Expenditure Proposal:
 - a. In the event that a principal proposes an unbudgeted expenditure that is advantageous to the school district, what manner of response would you employ?
7. Cost-Efficiency Strategies:
 - a. Describe the strategies you employ in your current position to reduce superfluous expenditures and achieve cost efficiency.
8. Grant Writing and Fund Utilization:
 - a. What is your experience in the areas of grant writing, grant process supervision, and the proper allocation of grant funds?

9. Experience in Surplus Funds Allocation:

- a. In your capacity as a school business manager, how have you optimized revenues and reduced expenses to bolster educational resources?

Resource Allocation Strategy and Expertise:

1. What are the procedures you employ to evaluate the effect on the overall budget when you identify unexpended funds or accounts that are generating a fund balance?
 - a. In what manner do you evaluate the equitable allocation of resources?
 - b. What is your perspective on the various methods of resource reallocation that can be employed to enhance student outcomes or to address equity?

Collective Bargaining:

1. Express your proficiency in the administration of both union and non-union working agreements.
 - a. In your previous positions, how have you successfully navigated collective bargaining processes?
2. What is your strategy for negotiating with unions to ensure that the agreements are equitable and beneficial to both the school district and its employees?
3. In what ways have you taken into account the community(ies) and taxpayers as a whole, with a particular emphasis on the sharing of services?
4. Could you provide an example of a successful collective bargaining experience in which you successfully balanced the requirements of the organization and the employees?

Food Service and the Philosophy of Child Nutrition in Schools:

1. In support of your Food Service Director's menu planning strategy, how do you ensure that school meals are nutritious, balanced, and appealing to students?
2. Could you provide a detailed account of your experience in overseeing food service programs that prioritize quality, safety, and adherence to nutritional guidelines?
3. What strategies have you employed to encourage students to make nutritious dietary choices and promote healthy eating habits?
4. What methods do you employ to incorporate the perspectives of students and their families into the development of menu options?
5. In order to improve the quality of school meals and accommodate dietary restrictions or preferences, how do you work with food suppliers, personnel, and parents?
6. How do you guarantee that the food service program is consistent with the district's approach to infant nutrition and wellness?
7. Do you have experience in the role of chairing and directing a district Wellness Committee?

8. Could you provide an example of a successful collective bargaining experience in which you successfully balanced the requirements of the organization and the employees?

Supervision, Bidding, and Management of School Bus Transportation:

1. What measures do you take to guarantee the safety and efficacy of school bus transportation services under your supervision?
2. How would you respond to the concerns of irate parents regarding the location of a bus stop on the first day of school while simultaneously balancing logistical considerations?
3. Could you provide a detailed account of your experience in overseeing the tendering process for school bus transportation contracts and guaranteeing adherence to regulations?
4. Would you be willing to elaborate on your experience in overseeing a school transportation department and your methodology for utilizing technology?
5. What strategies have you employed to optimize school bus routes, schedules, and maintenance in order to improve the quality of service and reduce costs?
6. What protocols do you have in place to address emergency situations or disruptions in school bus transportation services?
7. How do you enhance the overall administration of school bus services by collaborating with transportation staff, drivers, and stakeholders?

Supervision of Employees:

1. What is your method for establishing performance expectations for employees who report directly to you, such as the Director of Facility Operations, Food Service Director, or Director of Transportation?
2. Could you provide an example of a situation in which you were required to offer mentorship and guidance to new personnel under your supervision? In what manner did you approach this process?
3. How do you motivate and assist veteran employees during the supervision and evaluation processes?
4. To guarantee a positive and productive work environment, how do you foster trust and respect among the staff you supervise?
5. Kindly provide an example of a complex discipline case that you have previously encountered. Why was it difficult, how did you manage it, and what was the result?
6. Please provide an account of a challenging conversation you had with an employee regarding their performance. What were your objectives, how did you approach the discussion, and what were the results?
7. In the context of your professional experience, how have you resolved disputes with colleagues in educational environments? What lessons did you acquire from these circumstances?

8. Provide examples of how you have implemented mediation, negotiation, and collaboration abilities when collaborating with a variety of stakeholders, including parents, administrators, teachers, principals, and service providers.
9. How do you ensure accountability and performance enhancement while promoting growth and development among employees through the use of supervision and evaluation processes?
10. Describe your approach to progressive discipline and the methods you use to effectively address performance issues within your team.

Competitive Compensation Packages

- Structuring salary ranges and benefits to retain valued leaders
- Examples of contract terms (professional development, evaluations, buyback provisions, etc.)
- Has the SC reviewed and approved the SBO contract in advance of the posting?

Creating a Positive Work Environment

- Fostering a culture that values the finance leader's strategic input
- Providing professional growth opportunities and career pathways

Growing Knowledge and Skills

- Association of School Business Officials International (ASBO)
 - Annual conference attendance
 - School Finance Officer (SFO) Certification
 - Meritorious Budget Award
- Massachusetts Association of School Business Officials (MASBO)
 - Coaching or Mentoring
 - Regional Roundtables
 - Annual Conference Attendance & Monthly Professional Development Programs
 - Payroll Officer Training Program

Questions?



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