

K-12

Business Consulting, Inc.

"Effective School Solutions"

Treasurer/CFO Search Services



K-12 Business Consulting, Inc.
New Albany, Ohio
www.k12consulting.net

TABLE OF CONTENTS

Six Steps to a Quality Treasurer/CFO Search.....	1
OASBO & K-12 Business Consulting Treasurer Searches Conducted.....	2
Detailed Description of Treasurer Search Services Provided	3
K-12 Business Consulting’s Treasurer Search Services Team.....	11
Example - Search Brochure and Advertisement.....	14
Example - Search Profile Criteria Questionnaire.....	17
Example – Treasurer Search Profile.....	19

Step 1

- Identify characteristics of Treasurer and develop Search Profile
- Involve BOE, administration, staff
- Advise BOE on salaries and establish wage range for announcement

Step 2

- Review profile with BOE and seek approval for characteristics
- Publish Search Profile for community and stakeholders
- Prepare brochure to announce job and market district

Step 3

- Announce position availability and publish brochure
- Actively recruit candidates
- Screen candidates during process

Step 4

- Recommend semi-finalists to BOE for interview
- Provide interview management
- Cull list to two or three finalists for second interviews
- Help BOE identify finalist

Step 5

- Show samples of contract language including wages and benefits
- Help negotiate contract, if requested

Step 6

- Post appointment goal setting and development, if requested

School Business Official Search Program



*K12 are proud to list some of
the school districts we have assisted:*

- ✓ Amanda-Clearcreek Local Schools
- ✓ Beavercreek City Schools
- ✓ Bellefontaine City Schools
- ✓ Benjamin Logan Local Schools
- ✓ Bethel Local Schools
- ✓ Bexley City Schools
- ✓ Big Walnut Local Schools
- ✓ Butler Technology & Career Development
- ✓ Canal Winchester Local Schools
- ✓ Cardington Local Schools
- ✓ Chagrin Falls Exempted Village Schools
- ✓ Chillicothe City Schools
- ✓ Cincinnati City Public Schools
- ✓ Coshocton City Schools
- ✓ Dublin City Schools
- ✓ Fairborn City Schools
- ✓ Franklin County Educational Svc Center
- ✓ Franklin City Schools
- ✓ Fremont City Schools
- ✓ Gahanna-Jefferson City Schools
- ✓ Graham Local Schools
- ✓ Great Oaks Career Campuses
- ✓ Greenon Local Schools
- ✓ Greene County Career Center
- ✓ Groveport-Madison Local Schools
- ✓ Hilliard City Schools
- ✓ Jackson City Schools
- ✓ Kenston Local Schools
- ✓ Kenton City Schools
- ✓ Lake Local Schools
- ✓ Lancaster City Schools
- ✓ Lebanon City Schools
- ✓ Lima City Schools
- ✓ Lorain City Schools
- ✓ Madison-Plains Local Schools
- ✓ Manchester Local Schools
- ✓ Marysville Exempted Village Schools
- ✓ Marietta City Schools
- ✓ Marion City Schools
- ✓ Miamisburg City Schools
- ✓ Miami Valley Career Center
- ✓ Mount Gilead Exempted Village Schools
- ✓ New Lebanon Local Schools
- ✓ Northeastern Local Schools
- ✓ Northmor Local Schools

- ✓ North Ridgeville City Schools
- ✓ Northwest Local Schools
- ✓ Oak Hills Local Schools
- ✓ Olmsted Falls City Schools
- ✓ Orange City Schools
- ✓ Painesville City Schools
- ✓ Perrysburg Exempted Village Schools
- ✓ Pickerington Local Schools
- ✓ Piqua City Schools
- ✓ Princeton City Schools
- ✓ Reading Community Schools
- ✓ Reynoldsburg City Schools
- ✓ Ridgmont Local Schools
- ✓ Riverside Local Schools
- ✓ Sheffield-Sheffield Lake City Schools
- ✓ South Point Local Schools
- ✓ South-Western City Schools
- ✓ Springfield City Schools
- ✓ Springfield-Clark Career & Technical Center
- ✓ St. Clairsville-Richland City Schools
- ✓ Strongsville City Schools
- ✓ Talawanda City Schools
- ✓ Tallmadge City Schools
- ✓ Tecumseh Local Schools
- ✓ Tiffin City Schools
- ✓ Tolles Career & Technical Center
- ✓ Toledo City Schools
- ✓ Troy City Schools
- ✓ Upper Scioto Valley Local Schools
- ✓ Upper Valley Career Center
- ✓ Van Buren Local Schools
- ✓ Vandalia-Butler City Schools
- ✓ Vantage Career Center
- ✓ Warren City Schools
- ✓ Warren County Career Center
- ✓ West Clermont Local Schools
- ✓ Western Reserve Local Schools
- ✓ Westerville City Schools
- ✓ Westlake City Schools
- ✓ Willoughby-Eastlake City Schools
- ✓ Worthington City Schools
- ✓ Wyoming Schools
- ✓ Xenia City Schools



K-12 Business Consulting

Treasurer/CFO Search Services: Deliverables and FAQ's

K-12 Business Consulting (K-12) customize Treasurer/CFO searches to meet the client's timeline, expectations, and budget. Below is a complete description, and frequently asked questions, of the services and deliverables that Boards of Education can expect when hiring K-12 for their search.

1. Who is K-12 Business Consulting and why should you select us as your search consultant?

K-12 Business Consulting adds value with our association with OASBO, who is the school treasurer professional organization in Ohio. OASBO has deep roots into the treasurer profession and valuable contacts. As noted below K-12 Business Consulting has six (6) lead search consultants that have almost 230 years of combined experience as School Treasurers. In addition, all are past presidents of OASBO; and have been appointed to several boards and committees. Their combined network of contacts with Treasurer/CFOs, Ohio Department of Education, BASA, OSBA and OASBO are extensive and an provide an excellent conduit for candidate recruitment for our clients.

Chris Mohr has over 40 years of experience as a school Treasurer and Executive Director of Business. For the past twenty years he has served as president of K-12 Business Consulting, whose mission is helping school districts with forecasts, superintendent and treasurer searches, cost studies and other special projects.

Dolores Cramer has over 40 years of experience as a school Treasurer/CFO and assisting districts with professional development and mentoring. For several years Dolores has been helping districts with treasurer search service work as well as special projects.

Matt Feasel is Treasurer/CFO of Pike Delta York LSD and has over 40 years of experience in school finance and business. Matt provides support to districts with forecasting and search services.

Rebecca Jenkins is Treasurer/CFO of New Albany Plain LSD and has over 35 years of experience in school finance and business. For several years she has been helping provide support to districts with forecasting, mentoring and search services.

Sue Lehmann has over 24 years of experience with public schools in Ohio. Sue has a deep understanding of the operations of the Treasurer's office and specializes in using that understanding to implement processes to ensure proper use of controls. Sue assists districts with treasurer search services as well as special projects.

Jenni Logan is Treasurer/CFO of Lakota LSD (Butler County) and has over 30 years of experience in school finance and business. For several years Jenni has been providing districts with support with mentoring and treasurer search services.

Todd Puster is Treasurer/CFO of Orange City School District in Cuyahoga County. Todd has over 30 years as an Ohio school business official. Todd works on a team with the Ohio Department of Education updating Ohio's professional standards for School Treasurers and Business Managers. Todd assists districts with treasurer search services.

Cindy Ritter has over 40 years of experience as a school Treasurer/CFO. For several years Cindy has been helping districts with forecasts, grant writing, and treasurer search services.

Penelope Rucker is Treasurer/CFO of Huber Heights City School District and has over 30 years' experience with public schools in Ohio. Penny works with school districts to help them achieve financial success. Penny assists district with treasurer search services.

Melcie Wells is a licensed school treasurer with over 22 years of proven successful school experience. Melcie is very active within the school business community including mentoring new Treasurer's, developing and overseeing seminars, and leading the Ohio Association of School Business Officials as President in 2020-2021. Melcie assists with treasurer search services and mentoring services for school business officials.

The K-12 Business Consulting search team are all personally involved in the recruiting effort of every search conducted. You will not find a better networked or skilled treasurer search team in Ohio. When coupled with OASBO's network and valuable member recognition, K-12 Consulting is highly effective for districts looking for a new treasurer.

2. **How will K-12 Consulting coordinate the search process?**

K-12 Consulting works directly with the Board of Education, during an initial planning meeting, to:

1. Create a detailed calendar and timeline.
2. Designate a Search Liaison (The Liaison is typically the superintendent and his/her secretary or administrative assistant). While we keep the work demands on district staff to a minimum, their assistance is key to the search. The Search Liaison:

- Assists K-12 Consulting in reserving meeting locations on the agreed-upon dates and times.
- Ensures that public meeting notices are sent out on time.
- Distributes Search Profile Criteria Questionnaires.
- Acts as the authoritative district contact for specific questions candidates may have.
- Assists K-12 Consulting in gathering internal district data needed.

Communication early and often is the key to an efficient and effective search process.

3. **What is a Search Profile Criteria Questionnaire?**

The Search Profile Criteria Questionnaire ("Search Profile") is a tool, developed by K-12 Consulting, to form the foundation upon which the search is built. The Search Profile form is provided to the district in an easy-fill PDF, completed by specified district stakeholders in the search process. Questions are designed to define the "must-have" qualities in the district's new Treasurer/CFO.

When all data has been collected, a detailed Search Profile Report ("Report") is created and presented to the Board. Once the Report is approved, this information is used to help recruit candidates for the district.

4. **How are the Board, administration, staff, and other community stakeholders involved in the development of the Treasurer/CFO Search Profile?**

Our searches follow a tried-and-true process that K-12 Consulting has developed titled "K-12 Business Consulting's Six Steps to A Quality Treasurer/CFO Search Process." Steps one (1) through five (5) are covered in this narrative and are the core process used to find your next Treasurer/CFO.

Step six (6), while not included in our search service fee we recommend every client conduct a team building in-service when bringing on a new treasurer.

Districts vary on whom they wish to involve in the profile development process. Board of Education members and the superintendent individually submit their input on questionnaire or are interviewed personally by our search consultant. For a Treasurer/CFO search it is also common for K-12 Consulting to solicit information from both the Internal and External Groups noted below. All information shared with K-12 Consulting is confidential.

A) Internal Groups: central office administrators, building administrators, central office clerical staff, and treasurer office staff.

B) External Groups: business advisory council, booster groups, and Board finance committee members.

5. **What recruiting strategies does K-12 Consulting use to discover and recruit candidates?**

K-12 Consulting does not solely rely on advertising to recruit candidates. Advertising in key locations, however, is used to raise awareness of the position. All advertisements are reviewed with the Board and approval is secured before it is distributed.

The “Report” is an integral piece of the recruitment process for our searches and assists K-12 Consulting in identifying candidates that meet qualifications and needs of the Board. K-12 Consulting follows both quantitative and qualitative processes, using the “Report” as guidance.

In the quantitative process K-12 Consulting extracts data from many sources, including the Five-Year Forecast, annual audits, and detailed web searches. This method allows K-12 Consulting to identify potential candidates through hard data.

In the qualitative process, potential candidates learn of the district’s opportunity directly from K-12 Consulting. If interested in the position, the prospect undergoes a thorough interview including:

- Their work history
- Accomplishments
- Education level
- Leadership style and
- Major successes and failures in their career

In addition, K-12 Consulting will determine why the prospect is interested in the opportunity with your district, if the candidate is secure in his/her employment, and if there are concerns surrounding the prospective candidate.

6. **Does K-12 Consulting handle the development of advertising materials and candidate applications?**

K-12 Consulting prepares a professional announcement to be posted on OASBO’s and BASA’s job boards. This announcement is also sent to all Ohio Association of School Business Official (OASBO) members. These are the locations potential candidates will be searching if they are seeking new employment.

K-12 Consulting reaches out to directly recruit potential candidates who reflect the qualities of the Search Profile. This method is direct and effective without incurring excess cost.

7. **How does K-12 Consulting screen a candidate to ensure minimal risk to the Board?**

Before a prospective candidate becomes a full candidate, K-12 Consulting utilizes its network and online searches to conduct a due diligence screening.

All candidates are required to provide a copy of their Treasurer/CFO license. K-12 Consulting also checks the Ohio Department of Education (“ODE”) licensure website for information on license suspensions. The licensure itself comes with background and criminal activity verification via fingerprinting. These checks are more than adequate to surface issues for candidates who are being considered.

K-12 Consulting suggests that any candidate, considered a finalist, complete the district’s official application form before employment. This provides the district with additional legal security.

When K-12 Consulting has completed its outreach and screening process, a meeting with the Board is set to advise and assist in selecting the candidates they wish to interview.

8. Once final candidates are chosen, how does K-12 Consulting coordinate the interviewing process?

K-12 Consulting coordinates and manages every step of the interview process. Board members need only to show up with a pencil and a willing attitude. K-12 Consulting attends to everything else.

Interview Management from the Board’s Perspective:

K-12 Consulting prepares interview binders for every Board member, including each candidate’s

- Search Profile
- Candidate Ranking Sheet
- Cover letter and resume
- License, and CFO Screening Form and
- Interviewing Dos and Don’ts

Prior to the first round of interviews, K-12 Consulting creates a set of interview questions (behavioral event interviewing questions tailored from each district search profile report) for the Board. These questions will be reviewed with the Board, and Board members are encouraged to give feedback. On the first night of interviews, K-12 Consulting meets with the Board to review contents of the binder and specify what questions can and cannot be asked of candidates and who will ask which questions.

K-12 Consulting strongly suggests utilizing the behavioral event interviewing questions throughout the first round of interviews. This type of question will help the Board understand the candidates’ past performance.

Following the first round of interviews, the Board identifies the top two to three candidates and K-12 Consulting prepares questions for the second round of interviews.

During a candidate’s second interview, K-12 Consulting suggests asking candidates to make a presentation. This will give the Board an idea of how a candidate will present if they are Treasurer/CFO of your school district. K-12 Consulting will manage this process, working with the district to secure any needed technology.

K-12 Consulting follows up with all candidates – thanks them for their participation and extends well wishes for a bright and successful career. The goal is for all candidates to leave the district with a great impression regardless of the outcome of the interview.

Interview Management from the Perspective of the Candidates:

K-12 Consulting briefs the candidates on interview logistics (when/where).

As an add on to the search, K-12 Consulting can arrange for the candidate to arrive before their interview time for a meet and greet with other Board-selected stakeholders (such as key central office and building administrators, Finance Committee members, etc.) to have light conversation, and to get to know the candidate. This serves two purposes:

- 1) To help the candidate eliminate some of the “jitters” and
- 2) To provide another source of feedback to the Board about the candidate.

This can be a beneficial process for Boards to consider.

One member of K-12 Consulting will be on-site to assist with candidate management including, greeting, and introducing the candidate to the other administrators while they wait for their interview.

With Board approval, a member of K-12 Consulting will be in the room for the candidate’s interview. This promotes candidate accountability and ensures technical accuracy. K-12 Consulting will not play any role in the interview itself, however, will advise the Board on technical or legal points once the interview adjourns.

Following the interview, a member of K-12 Consulting will escort the candidate out of the interview and have a short discussion with them explaining the next steps and indicating when the candidate can expect a Board decision.

9. Does K-12 Consulting provide assistance to the Board in both developing an appropriate compensation package and negotiation services?

K-12 Consulting has gathered wage data from various sources to help determine an appropriate salary range and benefits. The Board should have an awareness of local wages in formulating an offer. Each district has unique challenges, and compensation packages must reflect these. K-12 Consulting has several Treasurer/CFO contracts to help select contract language and get a good idea of competitive wage and benefit packages.

As part of the final interviews, all candidates are asked to provide their current contract and all wage details. When designing a compensation package, it is helpful to know what the candidate may be leaving behind.

If requested, K-12 Consulting will mediate, advising both parties in bringing successful closure to the contract negotiations. K-12 Consulting is there every step of the way.

Additionally, K-12 Consulting can provide assistance in developing a consulting contract for the new Treasurer/CFO in order to smoothly transition into their new district.

K-12 Consulting is committed to making sure the contract is developed and signed. From the Board’s first meeting until its last, K-12 Consulting is there until the job is complete.

10. Can the K-12 Consulting provide references of past clients?

Mr. Chris Valentine, President Dublin City Schools	614-370-6147
Mrs. Holly Neumann, President Olmsted Falls City Schools	216-375-8440
Mrs. JoAnn Rigano, President Beaver Creek City Schools	937-602-9631
Dr. Beth Krause, President Kenston Local Schools	440-785-1388
Dr. Scott Ommert, President Western Reserve Local Schools	419-706-9599

Mrs. Debbie Dunlap, President Reynoldsburg City Schools	614-581-2870
Mrs. Kim Cope, Vice-President Lebanon City Schools	513-850-8923
Mr. Joe Idzakovich, President Miami Valley Career Center	937-477-8569
Mrs. Ester Lawson, Vice-President Warren County Career Center	513-314-6512
Mr. Al Nels, President Greene County Career Center	937-902-9090
Mrs. Tammy Brinkman, President West Clermont Local Schools	513-528-7136
Mrs. Lori Sanders, President of Pickerington LSD BOE	614-755-9066
Mrs. Joan Haushalter, President Bellefontaine City Schools	937-441-8284
Mr. Josh Parker, President South Point Local Schools	740-479-0067
Mr. Andy Wilson, President of Fairborn CSD BOE	937-672-9681
Mr. Steve Williams, President of Marion CSD BOE	740-361-1123
Mr. Michael Leifheit, President Van Buren Local Schools	419-889-4675

11. Does K-12 Consulting offer any guarantee for the search?

Once selected for the search, K-12 Consulting stays with the Board until a successful candidate is employed. That is the commitment and guarantee to the client. Nothing is invoiced until the search has concluded and a candidate is selected. The goal of K-12 Consulting is to place the right Treasurer/CFO in the right district.

If the candidate vacates their position within one year, regardless of the reason, K-12 Consulting will return for a modest fee and perform a condensed and efficient search. The majority of the detail work completed originally would still be valid. K-12 Consulting will revisit the finalists and sample the market for any new interest. To ensure swift turnaround, K-12 Consulting anticipates a 2-4-week process.

12. What are the prices of Treasurer/CFO search services?

Every Board of Education is unique. K-12 Consulting is pleased to offer a singular level of search services with add on options to meet the individual needs of each district.

The K-12 search services will yield quality results, and none of the K-12 searches are a paper screening only search. They will all involve recruiting and targeting of candidates.

The costs quoted include all

- K-12 Consulting time
- Research
- Search criteria development
- Recruiting
- Pre-screening interviews
- Evaluation of candidates
- Initial and final interviews
- Finalist evaluations and contract offers as noted in the highlight of services under each.
- OASBO mentoring program for a period of one year

The only additional charges will be for mileage costs to profile, screening, initial and final interview meetings, and any lodging accommodations for members of K-12 Consulting, if that cost would be less than the mileage charge. These costs are kept to an absolute minimum.

The Board is responsible for the following additional search expenses

- Costs to mail invitations to community and staff members for any forums
- Costs to place print and electronic advertisements, other than specified above
- Costs to print and mail materials to applicants
- Candidates' reasonable expenses incurred such as mileage, meals, and lodging; criminal background and third-party reference checking if requested.

Summary View of School Treasurer Search Service

\$7,900 – Search

- Search Profile – Electronic questionnaire for building, central office staff and administration, and treasurer’s office staff
- Search Profile – forms are given to BOE & Superintendent to prepare
- Review the detailed Treasurer Search Profile with BOE and Superintendent
- 3 to 4 weeks of recruitment
- 1 to 2 nights of 1st round interviews – 4 to 6 candidates
- 1 night of 2nd round interviews – 2 to 3 finalists



K-12 Business Consulting's Treasurer/CFO Search Services Team

We are pleased to introduce our Treasurer/CFO Search Team. Below is a brief description of each associate's academic credentials, extensive work experiences and areas of core competencies they specialize in. Our associates are field tested experts with years of experience in public education with an extensive network of contacts and associations which are vital in assisting your district in locating quality executive leadership.

CHRISTOPHER MOHR, AS, BS, MBA, RSBA, CGFM, OFAC - President

Chris has earned an MBA in finance and administration, and BS in accounting from Miami University of Ohio, an AS in business administration from Edison State College. He holds a designation of Registered School Business Administrator and the Ohio Financial Accountability Certificate. He has over 40 years of successful finance and management experience and is a licensed school treasurer, business manager and holds an Ohio Health, Life and Variable Annuity license. During his career he served districts with budgets from \$32 million to \$200 million and simultaneously served in the position of CFO & Executive Director of Business Affairs for both Dublin and Springfield City Schools. He has received many awards including Ohio School Treasurer of the Year, Ohio School Business Manager of the Year, OASBO Presidents Award, and the OASBO Virginia Ramsay's Award for Distinguished Service. In 2003 he served as President of OASBO. He brings expertise to school clients in 5-year forecast assistance in areas of modeling, projecting, presentation, levy analysis and modeling; school comparison studies; efficiency reviews; monthly financial report preparation; superintendent and treasurer recruiting; and mentoring for school business officials.

DOLORES CRAMER, BS, MAOM

Dolores has earned her BA AND MA In Organizational Management from Bluffton University. She is a licensed school treasurer and certified with HayMcBer in 360 Assessments and Climate and Style Assessments. She is also certified with Franklin Cover in "Leading With the Speed of Trust". She has over 40 years of proven successful school finance experience including 30 years of actual school treasurer experience. Dolores has received many awards in her career including the OASBO Rich Unger Professionalism award. She is also well versed in the new state software Redesign and spend the last 3 years doing end user testing of the software. Dolores was very active in state organizations serving on several committees, in addition to serving as President of the Ohio Association of School Business Officials in 2007. Dolores is pleased to provide Treasurer Search Profile services

MATT FEASEL, AS

Matt has earned his AS in Applied Business with a major in Computer Science from Owens Community College. He is a licensed school treasurer. He has over 40 years of proven successful school finance as a school treasurer. Matt's experience as a Treasurer/CFO, ranges from districts with a budget of \$6 million to over \$200 million. Matt has received many awards in his career including 2009 Northwest Region OASBO Distinguished Service Award and 2012 & 2013 the Ohio Auditor of State Award for Financial Reporting. Matt is very active in state organizations serving on several committees, in addition to serving as President of the Ohio Association of School Business Officials in 1998. Matt is currently the Treasurer/CFO of the Pike Delta York Local School District located in Northwest Ohio. Matt is pleased to provide a wide array of services including Treasurer Search Profile services and five-year forecast reviews.

REBECCA JENKINS, AS, BS

Rebecca has earned her AS in accounting from Belmont Technical College, and BS degree in accounting from Wheeling Jesuit College. She is a licensed school treasurer and business manager. She has over 35 years of proven successful school finance experience including 20 years of actual school treasurer experience. Rebecca's experience as a Treasurer/CFO, ranges from districts with a budget of \$6 million to over \$200 million. Rebecca has received many awards in her career including the OASBO Presidents Award, GFOA Award for Excellence in Financial Reporting, and the 2010 Ohio School Treasurer of the Year Award. Rebecca is very active in state organizations serving on several committees, in addition to serving as President of the Ohio Association of School Business Officials in 2009. Rebecca is currently the Treasurer/CFO of the New Albany Local School District located in Central Ohio. Rebecca is pleased to provide a wide array of services including Treasurer and Superintendent Search Profile services, five-year forecast reviews, levy analysis and modeling.

SUE LEHMANN, BS

Sue has earned her BS in Business Administration Accounting from Franklin University. Sue is a licensed school treasurer and has over 24 years of successful school finance experience. As Treasurer/CFO Sue has worked with budgets ranging from \$21 million to \$55 million. She has a deep understanding of the operations of the Treasurer's office and specializes in using that understanding to implement processes to ensure proper use of controls. Sue is a member of OASBO where she has served on the professional development committee and served as a facilitator. Sue brings her experience working with OFCC project funds and managing a large allocation of federal funds to the K12 team. Recently retired, Sue is pleased to provide special services on custom projects as well as treasurer recruiting services for school business officials.

JENNI LOGAN, BS, MA. Ed

Jenni has earned her BS in school administration from Ohio University, along with a BS in business administration from Shawnee State University. She is a licensed school treasurer and has earned her National Association of Securities Dealers Series 7. She has over 30 years of proven successful school finance experience including 21 years of actual school treasurer experience. Jenni's experience as a Treasurer/CFO, ranges from a district with a budget of \$12 million to over \$200 million. Jenni is very active in state organizations serving on several committees and is Past President of the Ohio Association of School Business Officials in 2006. Jenni retired as the Treasurer/CFO of the Lakota Local School District the 8th largest district in Ohio. Jenni is pleased to provide a wide array of services including treasurer and superintendent executive recruiting services, debt reviews, five-year forecast reviews, levy modeling, comparison studies; and mentoring services for school business officials.

TUDD PUSTER, BS, MBA

Todd has earned his master's degree in Business Administration from Kent State University with a concentration in finance. He earned a Bachelor of Arts degree from Ohio University with a dual major in political science and journalism, which gives him a unique perspective into public school governance. Todd has had a 30-year career as a school business official. He currently is the Treasurer/CFO of the Orange City School District in Cuyahoga County, a role he has held since 2015. He also has served four other Ohio school districts, which gives him personal insight into the fiscal challenges faced by high poverty, middle class, and high wealth school communities. Todd now serves on a team of school business officials working with the Ohio Department of Education to update Ohio's professional Standards for School Treasurers and Business Managers. Todd regularly shares his expertise in school finance as a presenter at state and national education conferences and webinars. He is serving as Vice President of the Ohio Association of School Business Officials and is scheduled to become president of OASBO during the 2024-2025 school year. Todd is a member of the Association of School Business Officials International and has earned the lifetime designation of Registered School Business Administrator. He recently served as a member of the ASBO International task force updating national professional standards. Todd has lived in northeastern Ohio most of his life affording him a unique perspective of the economic challenges and opportunities of the region. Todd is pleased to provide treasurer recruiting and mentoring services for school business officials.

CYNTHIA RITTER, BS, MA. Ed., RSFBO

Cindy has earned her MA in school finance from Ashland University, along with a BS in business administration from Findlay College. She is a licensed school treasurer and Registered School Finance Business Officer with over 40 years of proven successful school finance experience including 24 years of actual school treasurer experience. Cindy's experience as a Treasurer/CFO, ranges from a district with a budget of \$12 million to \$60 million. Cindy has received many awards in her career including the OASBO Presidents Award, Rich Unger Professionalism Award, Distinguished Service Award, and the Virginia Ramsey Award. Cindy has also served as President of the Ohio Association of School Business Official's in 2008. Before joining K-12 Business Consulting Cindy's last assignment was CFO of the Marysville Exempted Village School District. Cindy is pleased to provide a wide array of services including five-year forecasting analysis and preparation; levy analysis and modeling; district efficiency reviews; treasurer recruiting services and mentoring services for school business officials.

PENELOPE RUCKER, BS, MA

Penny attended The Ohio State University and Franklin University in Columbus, Ohio to earn her Bachelor of Science in Accounting. She also attended Ashland University in Columbus, Ohio to achieve her Master's in Education School Treasury. Penny is a Treasurer/CFO who works with school districts to help them achieve financial success. Penny believes that her work is more than working with numbers, she knows it has been vital to understand the systems that produce the flow of the dollars, and she has been focused on leadership to impact the effectiveness of those dollars. Penny has worked for many different types of districts – large, small, urban, rural, rich, and poor. She did consulting work when she was raising her family which allowed her to explore diverse school cultures. During the recession she worked at the largest urban school district in Ohio, Columbus City Schools, and currently she is retired from Beavercreek City Schools. Penny is experienced in leadership and communications with financial systems. She is interested in making an impact to improve financial stability in schools along with financial transparency. She speaks, mentors, trains, and motivates younger professionals to explore schools and help others achieve. Penny is pleased to provide treasurer recruiting and mentoring services for school business officials.

MELCIE WELLS, BA, MS

Melcie has earned her MS from Ohio University and a BA from Marietta College in Accounting. She is a licensed school treasurer with over 22 years of proven successful school finance experience including 14 years of actual school treasurer experience. Melcie's experience as a Treasurer/CFO includes serving a district with a budget of \$25 million as well as at one time, serving as a shared services Treasurer for two separate Districts. Melcie has been very active within the school business official's community including mentoring new Treasurer's, developing, and overseeing seminars geared at new individuals in the profession, and leading the Ohio Association of School Business Officials as President in the 2020-2021 year. Melcie has also paired up with the Superintendent of her District to present at seminars on the importance of the Superintendent/Treasurer relationship. Prior to her current role as a Treasurer/CFO for Warren Local Schools, Melcie worked 9 years for the State of Ohio Auditor's Office, Local Government Services Division, assisting Treasurer's and School Boards with financial statement preparation, fiscal emergency plans, compliance, and forecasting. Melcie is pleased to provide treasurer recruiting and mentoring services for school business officials.



Treasurer/CFO Search Reynoldsburg City Schools

REYNOLDSBURG CITY SCHOOLS
Empowering leaders who impact the NOW and innovate the FUTURE

The Community

Reynoldsburg is a thriving, multi-cultural community. It is a small, welcoming town, close to everything and yet distinct and charming. Reynoldsburg is due east of Columbus on US Route 40 and encompasses three counties, Franklin, Licking and Fairfield. While there are many new developments in the Route 256 corridor, Olde Reynoldsburg still retains the charm of an historic small town. Reynoldsburg has been featured in ads in Ohio Magazine Home and Away, Better Homes and Gardens, Good Housekeeping, Reader’s Digest, and Midwest Living. The City Parks and Recreation Department is responsible for 275 acres of parkland including nine major parks. Among them is Blacklick Woods Metro Park and Golf Course, a 643-acre park and award-winning championship course.

The Treasurer Search

The Board of Education is seeking qualified applicants for the position of Treasurer/CFO. The Board seeks an effective administrator in education and administration leadership to fill the Treasurer/CFO vacancy. It is anticipated the new Treasurer will begin as a fiscal consultant October 1, 202X and assume responsibilities as Treasurer on January 1, 202X. K-12 Business Consulting is assisting the Board in its search for an outstanding Treasurer/CFO.

District Profile	
School Buildings	
Elementary	6
Middle School	4
High School	1*
*Serves 2 campuses with 5 academies	
Total ADM	7,254
Number of Employees	
Administrative	54
Certified Staff	454
Classified Staff	176
Treasurer’s Staff	5

Qualifications/Responsibilities

The Treasurer/CFO is responsible for overseeing the entire financial operation of the organization, the accuracy and timeliness of all state and federal reporting, the development of the annual district operating budget and the Five-Year Forecast. The CFO is an active participant on the senior leadership team and will provide leadership for the district in areas including finance, strategic planning, program development, and is a resource for business and human resource functions. The applicant must possess a valid Ohio Treasurer’s license. Successful experience as a School Treasurer/CFO is preferred. The CFO must maintain integrity and high standards of ethics in all matters. The successful candidate will demonstrate the following financial leadership characteristics:

- Proven ability to work with others – a team player
- Strong financial and detail-oriented reporting skills
- Ability to facilitate educational discussions/decisions through a financial lens
- Excellent inter-personal and effective communication skills
- Knowledge of state and local funding issues, Ohio laws and regulations pertaining to public schools
- Experience in effective process management and organizational skills
- Leadership skills for staff and various finance committees
- Experience with and understanding of operating software and procedures

Compensation and Terms of Employment

The Board intends to offer the successful candidate a contract, as per law. The salary is competitive and commensurate with experience and qualifications. The district offers an attractive benefit package.

Reynoldsburg City School District is an Equal Opportunity Employer.
Employment is offered without regard to race, color, national origin, ancestry, citizenship status, religion, sex, gender identity or expression, economic status, age, disability, legally acquired genetic information, military status, or sexual orientation. 14

Reynoldsburg Board of Education

Debbie Dunlap, President	5	Years
Neal Whitman, Vice President	5	Years
Angela Abram	1	Year
Robert Barga	3	Years
Jeni Quesenberry	3	Years

Financial Data

Operating Millage:

Gross	59.80
Effective Residential	28.35
Effective Commercial	37.08
Bond Millage	9.75
Total Valuation	895,600,900

Appropriations – FY21

General Fund	84,166,966
Total – All Funds	134,178,492

General Fund Revenue

Local Taxes	37%
State Funds	52%
Other	11%

Application Process

Qualified individuals are encouraged to apply. Please submit:

- A cover letter emphasizing qualifications and reasons for interest
- An up-to-date resume
- List three (3) references from associates or board members who can speak to candidate qualifications and work experience
- A copy of current Ohio Treasurer Certificate/License
- A CFO screening form will be provided to the applicant upon application submission

Note: Applicants should not make personal contact with any Board of Education members.

All application materials can be mailed or emailed to:

K-12 Business Consulting
Reynoldsburg City Schools Treasurer Search
P.O. Box 476
New Albany, OH 43054
dcramer@k12consulting.net

Direct questions concerning the position to:

Dee Cramer at 937.243.2922 or dcramer@k12consulting.net
Becky Jenkins at 740.312.5394 or rjenkins@k12consulting.net

The District

Reynoldsburg City Schools is a school district within a first-ring suburb of Columbus, Ohio. Our mission is “Empowering leaders who impact the NOW and innovate the FUTURE”. Our mission statement is comprised of four categories: Student Learning, Student Experience, Communication and Finances.

The District enables students to take ownership of their learning and achieve their full potential through challenging, engaging, and relevant learning experiences. The staff, students, and community work together to build an inclusive environment where everyone, especially students, feel safe, supported, and engaged.

The District’s schools are schools of choice, meaning each has a special academic program, such as STEAM, and is open to any student in the District. Students choose classes and high school pathways, each with its own distinct focus related to postsecondary studies and careers. The goal is for every high school graduate to leave Reynoldsburg with a certificate, degree, or significant college credits aligned to their post-secondary goals.

Reynoldsburg City Schools collaborates with postsecondary educators and businesses across the state to ensure students are prepared for future careers, higher education, and roles as a global citizen in our society. Our diverse student body competes regionally and nationally in academics, the arts, and athletics. Reynoldsburg City Schools’ students engage in service learning and volunteering to help make their community better every day. Our students embody our mission of being empowered leaders who impact the now and innovate the future.

The city of Reynoldsburg, Ohio is growing at a rapid pace and is a highly sought-after location for businesses, families, and educators. As a result, the District is looking towards the future to address needs such as facilities and operations, growth, technology, and full-day Kindergarten.

Tentative Timeline

Announce Vacancy	06.15.202x
Application Materials Due	07.16.202x
Initial Interviews	07.26&27.202x
Final Interviews	08.10.202x
Action to Employ	08.17.202x
Est. Begin Employment	10.01.202x

These dates are approximate times. Applicants are reminded that application materials are subject to public records law.

**Deadline for applications is
07.16.202X**





Reynoldsburg City Schools - Treasurer/CFO Search

PROFILE DEVELOPMENT QUESTIONNAIRE

Thank you for agreeing to help in the development of the treasurer search profile. Your responses to the following questions will help the Board of Education develop a profile of leadership qualities for the new Treasurer/CFO. Please return your completed form to K-12 Business Consulting, our search consultants, by e-mail, mail, or fax to the address/fax number noted. Please do not identify yourself personally by name on this form.

PLEASE IDENTIFY THE GROUP YOU REPRESENT: (Please check only one)

**Board of
Education**

**District
Administrators**

**District
Staff**

**District
Fiscal Staff**

Community

1. What do you consider to be the two or three of Reynoldsburg City School District most significant strengths?
2. What would you consider to be the two or three most important issues facing Reynoldsburg City School District?
3. Please tell us your two or three characteristics which you think the Board of Education should look for in a new Treasurer/CFO:

4. The following characteristics and skills are all important for a successful Treasurer/CFO. To help us sharpen our focus for Reynoldsburg CitySchools, from your perspective and based on your perceptions of the organization’s needs, please rank from 1 to 10 in order of importance with 1 being the most important and 10 being least important the following characteristics you would like to see in a new treasurer:

- _____ Ability and willingness to deal fairly with administration, staff, and other stakeholders
- _____ Expertise in using operating system software (e.g. accounts payable, payroll, budgetary)
- _____ Expertise in design and implementation of business office procedures
- _____ Effective at communicating the organization’s finances in both written and verbal form
- _____ Successful experience as a Treasurer/CFO or Assistant Treasurer
- _____ Direct experience with school levies and financial forecasting
- _____ Knowledge of Ohio laws and legislation that concern school districts
- _____ Organizational and management skills
- _____ Knowledge of school facility construction and bond financing
- _____ Experience in state and federal financial reporting

5. Please share any additional thoughts below that you would want the Board of Education to consider:

SAMPLE

Thank you for your time and commitment to helping Reynoldsburg City Schools! Please return this form by May 21, 202x by mail, fax or scan and email to the email address noted below:

“Reynoldsburg Treasurer’s Search”
K-12 Business Consulting, Inc.
P.O. Box 476
New Albany, Ohio 43054
Fax 614-656-7526
dcramer@k12consulting.net

TREASURER SEARCH PROFILE

Reynoldsburg City School District

Reynoldsburg, Ohio

May 27, 202X



Prepared for the Board of Education

By



Dolores Cramer, Search Consultant
937-243-2922 ~ Fax 614-656-7526
dcramer@k12consulting.net

Becky Jenkins, Search Consultant
740-312-5394 ~ Fax 614-656-7526
bjenkins@k12consulting.net

TREASURER SEARCH PROFILE REPORT

May 27, 202X

This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period May 19, 202x through May 24, 202x. 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, the K-12 Business Consulting team 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, District staff (including union representatives), and Fiscal Staff through a survey that was sent out in an e-mail request. There were 22 submitted profile questionnaires which are the basis of this report.

Broad themes were highlighted in each question area into four (4) response groups (Board of Education, District Administration, District staff, and Treasurer office staff). Under each question in the report the response groups 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.

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. These comments are provided to help inform prospective candidates about information that should interest them about the district and the Treasurer’s position.

K-12 Business Consulting would like to commend the Board of Education for its efforts to include many key stakeholders in the development of the Treasurer Search Profile. The respondents’ views are vital in helping to shape the framework for the characteristics desired in the next Treasurer for the Reynoldsburg City School District. We would also like to thank Dr. Melvin Brown, Superintendent, and Ms. Tammira Miller, Treasurer for assisting with the disbursement of the profile surveys.

STRENGTHS OF THE DISTRICT

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

CONSISTENT

- Innovative and educationally adaptive to what is best for our students
 - Innovative teaching and learning practices
 - Making sure all students have opportunities
 - Programs in place to address the whole child philosophy for educating students
 - Putting kids first
- Diverse community that welcomes differences and challenges inequities
 - A value system for diversity, equity, and inclusion
 - Location as a crossroads of numerous cultures and areas
- Excellent administrators, teachers, support staff, and paraprofessionals
 - Talented and dedicated staff that care about our students
- Fiscal responsibility

BOARD OF EDUCATION

- Strong Superintendent, who has a distinct vision for our district
- Our district is most responsive to the pandemic, and was able to decrease the spread through stringent adherence to CDC guidelines
- We have many wrap-around programs that support the families of our District
- Good relations with the city government, including the mayor who is a teacher by profession
- The drive to bring all district systems into a consistent district-wide framework

DISTRICT ADMINISTRATION

- Communication
- Implementation of the strategic plan with fidelity
- Working to engage the community on important topics

DISTRICT STAFF

- Sense of pride among families
- Support of the community

TREASURER OFFICE STAFF

- All included in consistent
- Sense of community

IMPORTANT ISSUES FACING DISTRICT

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

CONSISTENT

- Continued growth in community and district
 - Classroom space
 - Building needs
- Funding issues
 - State funding
 - Local funding
 - Staffing
 - Forecasting for the growth
- Staff retention
 - Competing with neighboring districts

BOARD OF EDUCATION

- A divided constituency that is tied to special interests
- The need for all day kindergarten
 - Financing for the additional needs
- Continue to strengthen equity and unity between two high school campuses

DISTRICT ADMINISTRATORS

- Divide between the “sides” of the district
- Providing services and support to at-risk population

DISTRICT STAFF

- Morale/Trust
- Student social and emotional health
- Combating lost learning due to COVID
- Adaptable Curriculum would be helpful

TREASURER OFFICE STAFF

- Recovering from the pandemic
 - How to align the influx of grant funds with our strategic plan and financial goals

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

- Excellent communication skills
 - Confident communicator
 - Ability to speak in terms others will understand, layman's terms
 - Explain in a professional, open, non-confrontational, and respectful manner
 - Transparent
- Team player
 - Understand the mission and strategic goals of the district
 - Works well with Administrators, Board, and Staff
- Has proven leadership with managing a district
 - Does not need to be seasoned but should demonstrate progressive professional growth
 - Experience with grants and levies
 - Innovative and adaptive
- Ability to build relationships
 - Ability to interact with other financial professionals to get the best returns for the District
 - Willing to meet with and be engaging with all stakeholders, as part of the position
 - mindful of the changing community
- Fiscally responsible
 - Financially conservative mindset

BOARD OF EDUCATION

- The ability to say no and stand by it.

DISTRICT ADMINISTRATION

- Flexible
- Knowledge of the educational process beyond finance
- Long-term vision
- Good thought partner with the Superintendent
- Understand the priorities in today's educational climate
- Data driven
- Proactive / Self starter

DISTRICT STAFF

- Ethical
- Personable and creative
- Previous experience as a treasurer in another school district
- Someone who is comfortable with technology and use of new programs/platforms

TREASURER OFFICE STAFF

- Confident but willing to listen
- Positive team leader
- Knowledgeable about school law

TREASURER CHARACTERISTICS BY RANKING

CRITERIA	BOE	DISTRICT ADMIN	TREASURER STAFF	DISTRICT STAFF	COMBINED
Ability and willingness to deal fairly with admin, staff, and other stakeholders	6	5	2	2	4
Expertise in using operating system software	3	10	9	6	8
Expertise in design and implementing business office procedures	10	9	10	10	10
Effective at communicating district finances in both written and verbal form	5	2	4	3	3
Successful experience as a Treasurer/CFO or Assistant Treasurer	1	1	3	1	1
Direct experience with school levies and financial forecasting	4	3	8	8	5
Knowledge of Ohio laws and legislation that concern school districts	2	4	1	4	2
Organizational and management skills	7	8	7	5	7
Knowledge of school facility construction and bond financing	9	7	6	9	9
Experience in state and federal financial reporting	8	6	5	7	6

1= MOST IMPORTANT

10=LEAST IMPORTANT

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

RANK - TOP 5 CHARACTERISTICS

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

RANK – BOTTOM 5 CHARACTERISTICS

- 6 Experience in state and federal financial reporting
- 7 Organizational and management skills
- 8 Experience in using operating system software
- 9 Knowledge of school facility construction and bond financing
- 10 Expertise in design and implementation of business office procedures

It should be noted that regardless of the rankings of 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 and important issues facing the district, as well as the characteristics desired of the new Treasurer/CFO for the Reynoldsburg City 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, as its fiscal leader, to ensure financial stability.

It was reflected in the responses that the Reynoldsburg Schools staff are talented, dedicated, committed, and care for their students. As one respondent stated, our district is innovative and educationally adaptive to do what is best for our students. The district has innovative teaching and learning practices, making sure all students have the opportunities they need to succeed. Reynoldsburg Schools are part of a diverse community that welcomes differences and challenges inequities.

The next treasurer/CFO will need to have outstanding communication skills with the ability to communicate the district finances in ways that the staff, administration, and community can understand with transparency and clarity. This person needs to be a forward-thinking progressive leader, who understands the mission and strategic goals of the district.

The successful candidate will need to be a team player with the ability to work well with and in a collaborative way with the Board, Superintendent, staff, and community. The Treasurer/CFO should be one who can meet with and be engaging with all stakeholders of the district and community.

The respondents said it best: the next candidate should be someone who can articulate the district finances in an understandable way for the public. The successful candidate should be approachable, collaborative, and team oriented. The main challenges will be dealing with the growth of the district and the building projects that accompany such growth. It is important for the successful candidate to be a strong leader who is innovative and can think outside of the box.

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 Reynoldsburg City School District, in addition to the major areas noted above, the respondents recognize the need for a person who will be invested in the district and build relationships. The successful candidate should be committed to be a long-term hire.

The district is experiencing some of the same challenges faced by many Ohio school districts; 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 has the attributes outlined above, possesses the skills and energy needed to address the issues and concerns expressed by respondents, and who will be eager to be a part of Reynoldsburg City School District for many years.

Respectfully submitted
K-12 Business Consulting, Inc.