

**TREASURER SEARCH PROFILE**  
**Amanda-Clearcreek Local School District**  
**Amanda, Ohio**  
**September 4, 2020**



**Prepared for the Board of Education**

**By**



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## **TREASURER SEARCH PROFILE REPORT**

September 4, 2020

This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period August 27, 2020 through September 2, 2020. 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, Union Representative, Community Members, and Fiscal Staff through a survey that was sent out in an e-mail request. There were 17 submitted profile questionnaires which are the basis of this report.

Broad themes were highlighted in each question area into five (5) response groups (Board of Education, District Administration, District Staff, Community Members, and Treasurer office staff). 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.

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 respondent's views are vital in helping to shape the framework for the characteristics desired in the next Treasurer for the Amanda-Clearcreek Local School District. We would also like to thank JB Dick, Superintendent 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**

- Community support with passage of 2% school levy for 15 years
- Great staff, administration, and community relation.
- Strong sense of community/sense of pride
  - Feels like family
  - Put students first

### **BOARD OF EDUCATION**

- Great facilities

### **DISTRICT ADMINISTRATION**

- Drive for students and staff
- Challenging students to become independent, critical thinkers
- Challenging staff members to utilize creative approaches in the classroom
- Good leadership team
- Great students
- Facilities and work environment are top notch

### **DISTRICT STAFF**

- District is responsive to the needs of the community at large

### **TREASURER OFFICE STAFF**

- Excellent administrative staff that works well together

### **COMMUNITY MEMBERS**

- The small size of the district allows for personalized/ individualized instruction/attention
- Commitment to developing well-rounded students, whether college or a career
- Geographically located in rapidly growing region of the state
- Active supporters and boosters

## **IMPORTANT ISSUES FACING DISTRICT**

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

### **CONSISTENT**

- Dealing with COVID-19 in all aspects
  - Restrictions/Innovation
  - Mandates
  - Additional costs
  - School activities
- With the passage of the levy, being fiscally responsible by spending tax dollars wisely
  - Long term vision
  - Collection due to economic downturn
- Continued improvement with communications in all areas
  - Public trust
- Capital improvement projects and communicating these needs and necessity
  - Maintenance and upkeep on facilities

### **BOARD OF EDUCATION**

- Socio-economic split within regions of the district
- Rise in number of students with special needs
- Selecting a treasurer that fits the districts culture
- Transparency – The board strives to be above reproach.
  - Aware of public perception and avoid appearance of secrecy

### **DISTRICT ADMINISTRATORS**

- Maintaining community/parental support through all the changes in education
  - New and innovative ways of growth and change
- The Boards respect for the Treasurer
- Community trust in regard to district leadership

### **DISTRICT STAFF**

- Communicating Trust/Appreciation
- The Boards respect for the district employees
- Consideration of emerging technologies and curriculum programs
- Effective communication not just the decision but the why's of a decision

### **TREASURER OFFICE STAFF**

- Keeping up employee morale

### **COMMUNITY MEMBERS**

- Attain and retain high-level teaching staff
- Wider variety of challenging electives to prepare students for the future
- Communication on strategic plan
- Growing drug issue in the surrounding community

## **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**

- Experience and knowledgeable about school finance and school law
  - State and Federal Programs
- Excellent communication skills in layman terms
- Team player
- Demonstrates honesty, integrity and fiscal responsibility
  - Transparency

### **BOARD OF EDUCATION**

- Ability to work with the Superintendent, administration, and staff on all financial matters
- Well organized and thorough
- Sensitive to the community culture

### **DISTRICT ADMINISTRATION**

- Approachable, demonstrate patience when working with staff and community
- Long term awareness so necessary funds can be spent now
- Ability to handle public questions and criticisms
- Understanding the day to day operation of the school to be able to correlate the classroom needs to the finances

### **DISTRICT STAFF**

- Ability to handle public scrutiny

### **TREASURER OFFICE STAFF**

- All included in consistent

### **COMMUNITY MEMBERS**

- Strong account & finance acumen
- Ensure regulatory compliance and advise the Board and administration in regard to options to achieve their goals
- Be the face of their department, be engaging to and with the community
- Long term hire

**TREASURER CHARACTERISTICS BY RANKING**

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

**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 Effective at communicating district finances in both written and verbal form
- 3 Ability and willingness to deal fairly with administration, staff, and other stakeholders
- 4 Knowledge of Ohio laws and legislation that concern school districts
- 5 Organizational and management skills

## **RANK – BOTTOM 5 CHARACTERISTICS**

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

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 Amanda-Clearcreek 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.

It was reflected in the responses that the Amanda-Clearcreek Local Schools are dedicated, committed and care for the students. The district has exceptional leadership and stability in the board and administration and that the district has excellent facilities and are fiscally responsible. Respondents also noted that there is a family type feel of the community and district that they have the students as their number one priority.

The next treasurer/CFO will need to have outstanding communication skills and have 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 accessible, approachable and open to new ideas, team oriented, and have knowledge of school finance, law, economic resources, and policies. It is indicated that the number one priority is someone with experience as a treasurer or assistant treasurer.

The successful candidate will need to have experience in communicating in layman's terms. 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 administrators, teaching staff, community members, or students.

The respondents said it best, the next candidate should be someone that can articulate the district finances in an understandable way for the public. The successful candidate should be approachable and team oriented. The main challenges, to the district, will be dealing with the effects of the COVID-19 mandates and funding of those requirements, as well as being fiscally responsible with the 2% 15-year levy for the long term.

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

Amanda-Clearcreek Local School District, in addition to the major areas noted above, the respondents recognize the need for a person who is approachable as well as being transparent and cognizant of the community culture. The successful candidate should be committed to being a long-term hire.

The district is experiencing many of the same challenges faced by most 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 Amanda-Clearcreek Local School District for many years.

Respectfully submitted  
K-12 Business Consulting, Inc.