

TREASURER SEARCH PROFILE
Western Reserve Local School District
Collins, Ohio
December 23, 2020



Prepared for the Board of Education

By



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TREASURER SEARCH PROFILE REPORT

December 22, 2020

This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period December 17, 2020 through December 21, 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 Representatives (District staff), Community, and Fiscal Staff through a survey that was sent out in an e-mail request. There were 15 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, Treasurer office 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.

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 Western Reserve Local School District. We would also like to thank Rodge Wilson, 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

- Strong, dedicated, flexible staff
 - Have the students' best interest at heart
 - Work as a family
- Community support
 - Tight knit, caring
- Financially stable, responsible, accountable

BOARD OF EDUCATION

- Very good facilities
- Small student teacher ratio

DISTRICT ADMINISTRATION

- Pride in the academic school as well as the physical facilities
- Emphasis on history of the district and honoring that history
- Available technology
- Upkeep of facilities

DISTRICT STAFF

- Never give up in any situation
- Make the best of what we have and what we have to deal with

TREASURER OFFICE STAFF

- Staff retention
 - Low turnover

COMMUNITY

- Flexibility and knowing when that flexibility is needed
- Advocate for the district

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
 - Keeping our students and staff healthy
- Communication at all levels
- Declining enrollment
 - Maintaining small class size
- Maintaining fiscal health
- Keeping up with ever changing technology
 - Staying competitive with online and postsecondary options
 - Educational variety / Limited academic programs

BOARD OF EDUCATION

- Transfer the community commitment of helping into the classroom
- Develop trust at all levels
- Leadership
- Low staff moral
- Shortage of subs

DISTRICT ADMINISTRATORS

- Student performance and graduation transition

DISTRICT STAFF

- Showing that our school is one of the best around

TREASURER OFFICE STAFF

- Included in consistent

COMMUNITY

- Acquiring and retaining excellent educators
- Facilities (Athletic)

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
 - Demonstrate honesty, integrity and fiscal responsibility
 - Transparency
 - Trust
 - Clean Audits
- Excellent communication skills
 - Layman's terms
 - Keep all parties informed
- Team player/ Collaborator
 - With Board, Superintendent, staff, community,
- Longevity
 - Invested in the district
 - Fit into a small, rural community
- Leadership
 - Forward thinking and progressive
 - Innovative

BOARD OF EDUCATION

- Included in consistent

DISTRICT ADMINISTRATION

- Direct, in a tactful manner
- Understanding and willingness to maintain buildings and grounds
- Support extra-curricular with general funds
- Understanding the economics status of the families in the community

DISTRICT STAFF

- Easy to work with
- Available to help answer questions, solve problems, approve funds

TREASURER OFFICE STAFF

- Approachable

COMMUNITY

- Get more funding so we can do more for our students and staff
- Open minded about doing what is best for our students, not always about money
- Common sense

TREASURER CHARACTERISTICS BY RANKING

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

1= MOST IMPORTANT

10=LEAST IMPORTANT

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

RANK - TOP 5 CHARACTERISTICS

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

RANK – BOTTOM 5 CHARACTERISTICS

- 6 Organizational and management skills
- 7 Experience with school levies and financial forecasting
- 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 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 Western Reserve 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, as its fiscal leader, to ensure financial stability.

It was reflected in the responses that the Western Reserve Schools are dedicated, committed and care for their students. Respondents noted that there is a tight knit, caring community and district and that their student are their number one priority. It is important to this district that the successful candidate be invested and an integral part of the community. They are looking for someone that wants to make a long-term commitment to the district, and not just a stepping-stone in a career.

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 the ability to communicate effectively in both written and oral form in terms that all can easily understand.

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 demonstrate honesty, integrity, trust, transparency, and fiscal responsibility.

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, collaborative, 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 able to deal with and adjust to declining enrollment. It is important for the successful candidate to be a strong leader that 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 Western Reserve Local School District, in addition to the major areas noted above, the respondents recognize the need for a person who is knowledgeable, approachable as well as being transparent and fiscally responsible. The successful candidate should be committed to be 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 Western Reserve Local School District for many years.

Respectfully submitted
K-12 Business Consulting, Inc.