

TREASURER SEARCH PROFILE

Bethel Local School District

Tipp City, Ohio

February 19, 2021



Prepared for the Board of Education

By



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TREASURER SEARCH PROFILE REPORT

February 19, 2021

This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period February 9, 2021 through February 16, 2021. 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), Community 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 four (4) response groups (Board of Education, District Administration, District Staff and Treasurer office staff; there were no respondents from the community group). 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 Bethel Local School District. We would also like to thank Justin Firks, Superintendent and Della Felton, Central Office Secretary 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
 - Makes the students feel loved
 - High retention
- Community support
 - Tight knit, caring, family like atmosphere
 - Community pride in our school
- Financially stable, responsible, accountable

BOARD OF EDUCATION

- All included in consistent

DISTRICT ADMINISTRATION

- Administrative team that has a strong desire to do what is best for kids
- Many staff have chosen to bring their own children to Bethel Local Schools, which is the highest compliment to our district
- Plans to build a K-5 building and athletic complex with very little cost to the taxpayers
- Superintendent has strong and effective leadership (clear, concise expectations and vision)
- Improved district morale and culture
- Trust is being earned

DISTRICT STAFF

- Good administration that works together and observes the needs of all staff
- Continued growth in the district

TREASURER OFFICE STAFF

- All included in consistent

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
 - Construction projects
 - Creative funding
 - Long term planning
- COVID 19 issues

BOARD OF EDUCATION

- Diversity in our district
 - Inclusion of all
- Unique financing of K-5 building and stadium
- Tax Incentive Financing (TIF)
- Levy structure – we have 4 renewable levies
 - Need to simplify for long term
- Negotiations
- While traditionally conservative and predominantly rural, shifting to a majority suburban
 - Be sensitive to the past but embrace the future

DISTRICT ADMINISTRATORS

- The Board members, at times, can get involved in the day-to-day operations making it a difficult environment to work in
- Frustration with staff not following new procedures/systems put into place
- Cultural diversity is increasing in the district, with accompanying language/cultural barriers
 - Building trust with these new families
- Tradition and “the way it has always been” can hinder positive growth opportunities

DISTRICT STAFF

- Trust and unity, not division
- Rapid growth will necessitate hiring of more staff, both certified and classified
 - We will need to be patient and work together during this process for the sake of the children

TREASURER OFFICE STAFF

- Need more parental involvement

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
 - Layman's terms
 - Keep all parties informed
 - Engaging will all stakeholders
- Experience as a Treasurer or Assistant Treasurer
- Navigate a growing district
- Professional, ethical, shows integrity, honesty, and respect
- Leadership
 - Forward thinking and progressive
 - Innovative
 - Team player
 - Leads "By example"
 - Builds trust
- Plans the budget with the administrative team
 - Communicate changes
- Invested in the community

BOARD OF EDUCATION

- Emotional Intelligence
 - Ability to "read the room"
 - Good people skills

DISTRICT ADMINISTRATION

- Works effectively with different personalities
- Ability to stand firm when necessary
- Working towards what is best for students

DISTRICT STAFF

- Exhibits self-control

TREASURER OFFICE STAFF

- Confidentiality
- Someone that knows all of the jobs within the treasurer's office
- Strong managerial skills

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

RANK – BOTTOM 5 CHARACTERISTICS

- 6 Knowledge of school facility construction and bond financing
- 7 Experience in state and federal financial reporting
- 8 Experience with school levies and financial forecasting
- 9 Experience in using operating system software
- 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 Bethel Local School District. The respondents were clear that this is a very important person to the overall health of the district serving an integral role in the day-to-day operations, as its fiscal leader, to ensure financial stability.

It was reflected in the responses that the Bethel Schools are dedicated, committed and care for their students. As one respondent stated, our students know they are loved. Respondents noted that the staff is excellent and one of the district's greatest assets. The district has a high retention rate for staff. There is great community participation and support. It is important to this district that the successful candidate be invested and an integral part of the community.

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 a forward-thinking progressive leader. It is indicated that the number one priority is someone with experience as a Treasurer or Assistant Treasurer that can take on a fast-growing district with the highest level of professionalism and emotional intelligence.

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, respect, transparency and fiscal responsibility.

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, to the district, will be dealing with the rapid 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 Bethel Local 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 nurture trust. 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 Bethel Local School District for many years.

Respectfully submitted
K-12 Business Consulting, Inc.