

TREASURER SEARCH PROFILE

Miamisburg City School District

Miamisburg, Ohio

July 14, 2021



Prepared for the Board of Education

By



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TREASURER SEARCH PROFILE REPORT

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This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire utilized by K-12 Business Consulting during the period July 2, 2021, through July 12, 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), Fiscal Staff, and community through a survey that was sent out in an e-mail request. There were 29 submitted profile questionnaires which are the basis of this report.

Broad themes were highlighted in each question area into four (5) response groups (Board of Education, District Administration, District staff, Treasurer office staff, and community). 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 Miamisburg City School District. We would also like to thank Dr. Laura Blessing, 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

- Student centered decision making and planning with an emphasis on the “whole child”
 - Willingness to improve and do what is best for the students
 - Service oriented for our students, families, staff, and community
- Great staff!!
 - Staff teamwork
 - Willingness to be flexible and think outside the box
 - Strong pre-K-12 education
 - Eager to work together to plan and problem solve
- Community support
 - School, community, and family partnership
 - People want to be here
 - Sense of community/pride
- Fiscal responsibility/ Great facilities
- Leadership within the administration
 - Think outside the box and try new ventures

BOARD OF EDUCATION

- Administration, staff, and board are working on equity issues so that all children have the tools to be successful
- Positive place to be
 - Working through the pandemic has brought our staff closer together
- Small town feel, but still offer a strong curriculum for our students
- Good image within the community

DISTRICT ADMINISTRATION

- Collaborative decision making and planning that includes all stakeholders
- Good relationship with the City and Township
- Open lines of communication
- Vision of the future
- Strong strategic plan that will guide our decisions
- We are a family, and we look out and help each other in all situations

DISTRICT STAFF

- Strong administrators
- Continuous goals and direction for the district
- School Board that is willing to listen, hears and understands the challenges facing the district as well as understands the importance of the role of all employees
- Many of the staff are “lifers” and other have adopted in. We love our town and our schools! We grew up here and want our kids to have the same experiences we did, and we want to give back to this community.

TREASURER OFFICE STAFF

- All included in consistent

COMMUNITY

- Recognized in the area as being a leading school district

IMPORTANT ISSUES FACING DISTRICT

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

CONSISTENT

- District Finances
 - Look for ways to increase revenue
 - Fiscal responsibility in spending of ESSR funds
 - Paying down debt for Holland Field
 - Prioritize and focus on what is most important, we cannot do it all but do what we can well

- Declining Enrollment

- Changing / Diversity in the population
 - Redistricting to promote equity and address new home development
 - Equity throughout our District so all students receive the same education
- Technology
 - One to One
- Communication
 - The what that is happening and the why
- Trust
 - Within the chain of command
 - With the City and Township leadership
- Improve working relations with Teamsters' Union

BOARD OF EDUCATION

- Improve morale and consistency of rules and regulations
- Training for staff on racial issues

DISTRICT ADMINISTRATORS

- Address “gaps” created by the Pandemic
- Continue to build on educational opportunities for student that prepare them for their next academic and life steps
- Need to address increasing needs population
- Following through with new initiatives/giving time before giving up

DISTRICT STAFF

- Improving student scores
- Returning to normalcy
- Paying a competitive wage to all staff.
 - Retention of staff
- Providing affordable insurance
- Transparency
- Setting high expectations and accountability

TREASURER OFFICE STAFF

- Improve efficiencies and address growth

COMMUNITY

- Programs available for students depending on available funds

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
 - Ability to build trust through communication
- Team player
 - Understand the mission and strategic goals of the district
 - Works well with Administrators, Board, and Staff
 - Visibility within the district and community
- Problem Solver
 - Not just a “no” answer but a “how can we”
 - Ability to “think outside of the box”
- 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
 - City and Township relations
 - Conveys respect
 - Be present within the community
 - Friendly/Relatable/Personable
- Fiscally responsible

BOARD OF EDUCATION

- All in the consistent section

DISTRICT ADMINISTRATION

- Knowledge of school finance including TIF and JEDD agreements
- Ability to review processes and willingness to influence efficiencies and change
- Organized
- Fair and honest
- Prepared
- Care about the Burg, not just a stopover place but rather long-term commitment

DISTRICT STAFF

- Timely

TREASURER OFFICE STAFF

- Ability to implement efficiencies

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

1= MOST IMPORTANT

10=LEAST IMPORTANT

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

RANK - TOP 5 CHARACTERISTICS

- 1 Knowledge of Ohio laws and legislation that concern school districts
- 2 Effective at communicating district finances in both written and verbal form
- 3 Successful experience as a Treasurer/CFO or assistant Treasurer
- 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 Organizational and management skills
- 7 Experience in state and federal financial reporting
- 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 Miamisburg 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 Miamisburg Schools staff works as a team, and they want the new CFO to be an integral part of that team. Working to educate and guide our children from the perspective of the “whole child” was brought up many times. As one respondent stated, one of your primary issues facing the district is being able to address the needs of the “Whole Child” and having the staff that can meet those needs. The district is very much a family and many of the staff are lifelong residents of the district. They want their children to have the same advantages and positive experiences that they had.

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. There is a need to build trust, and relationships with the County and Township financial officials and the district unions, so someone with this skill set is vital to the district.

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 declining enrollment, post COVID finances, and effects of the new housing development. 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 Miamisburg 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 Miamisburg City School District for many years.

Respectfully submitted
K-12 Business Consulting, Inc.