

Deborah L. Carson

1661 Fox Trail · Bellbrook, OH 45305 · (434) 327-8020 · goldencarson@yahoo.com

September 8, 2024

Bellbrook-Sugarcreek Local School Board of Education:

As soon as I saw your posting for Treasurer/CFO, I knew it was the perfect position for me—and that I was the perfect solution for you. Let me explain further:

As you see from my attached resume, I've worn a lot of different hats. What isn't included in my resume is that as a military family we moved too many times to count. That has taken us to some pretty great places and while I didn't necessarily get paid to work, I did use my time to volunteer for organizations that I could help with finances, you name it, I've done it.

No matter where I've been, I've produced top-notch work because I'm dedicated to making sure each part of my job is done correctly. I'm extremely motivated, organized and disciplined. I pride myself on being able to juggle several projects at once without any of them faltering. That comes from having 3 boys – all with a love of sports. Most seasons their playing schedules constantly kept me busy. It was adapt or die trying. I've learned to budget my time and my assets, and most importantly, I've learned to be flexible and to get things done.

I'm looking for a position where my contributions count, and my efforts are appreciated—and hopefully a long-term commitment. We chose Bellbrook as our home after my husband retired in 2016 based on the great schools that are available. As a Bellbrook resident, my 3 boys have all graduated from our awesome school district. They participated in baseball, football, track & field, and wrestling. I am dedicated to our district's prosperous future for our future graduates and our AWESOME community. Go Eagles!

Thank you for considering my application. I am excited about the opportunity to potentially join your team and contribute to the continued success of Bellbrook-Sugarcreek Schools.

Warm regards,

Deborah L. Carson

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PERSONAL STATEMENT

Treasurer/CFO with over 8 years of experience across various Ohio school districts, including an ESC, charter school, career center, and traditional schools. I bring comprehensive expertise in all facets of the Treasurer's office. As a Bellbrook resident with a deep personal investment in the success of the Bellbrook-Sugarcreek Local Schools, I am committed to ensuring a strong and prosperous future for our community's education system.

PROFESSIONAL EXPERIENCE

Treasurer/CFO

December 2021-Present

Clark County Educational Service Center, Springfield, OH

- Serves as the Chief Fiscal Officer for a governing school board of 5 members, I effectively allocate and monitor a \$20 million budget, continuously recommending improvements to enhance fiscal operations and accountability.
- Manages contract services across 7 traditional schools, 5 non-public schools, and several Clark County agencies, I ensure seamless financial operations.
- Conducts in-depth research and analysis, I inform budget formulation and execution, successfully preparing annual budget and appropriation measures in compliance with Auditor of State governance practices.
- Manages over \$3.1 million in federal and state grants, I ensure compliance and maximize the impact of these funds.
- Overseeing the preparation of a semimonthly payroll for 300 employees, exceeding \$1.5 million, I maintain accurate records and ensure timely processing.
- Performing value-added financial analysis, I make informed decisions that maximize resources, strengthen our mission, and maintain robust financial support for participating school districts and stakeholders.
- Assists in the preparation of grant applications, I help secure additional funding and resources.
- Supervises a team of 3, including an Assistant Treasurer, Payroll Specialist, and Accounts Payable, I foster a productive and teamwork environment.
- Maintains accurate financial records, I adhere to board-approved procedures, laws, regulations, and policies with full transparency and robust internal controls.

Assistant Treasurer

June 2021-December 2021

North College Hill City School District, Cincinnati, OH

- Served as Assistant Treasurer in a district with a \$17 million budget, ensured seamless payroll operations by managing the payroll process for 200 employees, maintaining a high level of transactional accuracy and operational integrity.
- Successfully led the transition of the district to an updated state software program for accounts payable (AP) and payroll, ensuring a smooth integration process, minimizing disruptions, and enhancing overall efficiency in financial operations.
- Enhanced employee satisfaction and retention by effectively administering a comprehensive suite of benefits, including retirement plans, medical, dental, vision, and life insurance.
- Facilitated efficient audit processes by providing comprehensive information and reports to auditors, aiding in the preparation of GAAP and audit reports, and reducing overall audit costs.

Head Payroll Specialist

June 2020-June 2021

Xenia Community Schools, Xenia, OH

- Maintained flawless payroll operations by overseeing the payroll process for over 500 employees, achieving exceptional accuracy and upholding strong operational integrity.
- Delivered precise financial insights by preparing meticulous monthly, quarterly, and annual reconciliations and tax reports, contributing to enhanced financial oversight and planning.
- Supported district personnel development by training staff on payroll department policies, procedures, and new computerized payroll enhancements, ensuring smooth adoption and effective use of updated systems.

Assistant Treasurer

April 2019-June 2020

Greene County Career Center, Xenia, OH

- Served as the Assistant Treasurer in a district with a \$15 million budget and managed bi-weekly payroll and benefits for 140 employees, ensuring timely and accurate compensation and benefit administration.
- Prepared and filed monthly state food service reports, ensuring timely submission and compliance with state regulations.
- Streamlined the preparation of GAAP and audit reports by providing timely and accurate information to the Auditor's office, resulting in minimized audit costs.
- Successfully administered FMLA leaves in full compliance with organizational policies and state/federal regulations, ensuring adherence to employment laws

Assistant Treasurer

November 2016-April 2019

Dayton Early College Academy/DECA Prep, Dayton, OH

- Processed bi-weekly payroll for 160 employees and substitute teachers, ensuring timely payment for two schools, and accurately handled federal/state taxes and garnishments
- Managed all accounts payable functions for three school buildings, including end-of-month reconciliation.
- Prepared, examined, and analyzed district financial reports, efficiently allocating and monitoring financial resources to ensure accuracy for both fiscal and calendar year-end closings.
- Managed employee benefits, including health, dental, vision, and voluntary deductions, ensuring accurate administration and employee satisfaction.

EDUCATION

- B.S., Organizational Management and Leadership, emphasis in accounting, 2003
Friends University, Wichita, KS

CERTIFICATIONS

- Treasurer License, State of Ohio, Expires July 2025
- Currently hold Public Official bond insurance through Travelers Casualty and Surety Company of America

COMMUNITY INVOLVEMENT

- Current Board Member, Miami Valey Educational Computer Association

References:

Denise Robinson, Treasurer, Tecumseh Local School District (937) 244-6466

Nichole Cotrell, Treasurer, Springfield City School District (937) 901-3179

Kathleen Estep, Board Member, Clark County ESC Board of Education (937) 286-7714



Clark County Educational Service Center

Your Educational Partner

Board of Education

Amy Foreman, President
Dr. Cindy Knapp-Baird, Vice President
Dr. John Crankshaw
Kathy Estep
Stanley Wenclewicz

Superintendent

Daniel Bennett

Associate Superintendent

Susie Riegler

Treasurer/CFO

Deborah Carson

Recommendation for Deborah Carson

I am currently a member of the Clark County Educational Service Center Board of Education. Deborah Carson has served as our Treasurer and Chief Financial Officer during my term of office. It is my pleasure to recommend her for employment as Treasurer in her home school district. I have found her to be knowledgeable, competent, and professional. She provides the board with timely reports that are always complete and understandable.

Deborah has a clear understanding of school finance, budgeting, financial planning, cash management, investments, grant management, and technology. I do not personally have a background in finance, so I appreciate that she provides the board with more than just spreadsheets of financial data. She is adept at creating visual aids to enhance our understanding of the financial resources available to us in making decisions.

I have attended conferences with Deborah and have observed first hand her commitment to professional development and lifelong learning. Additionally, she demonstrates a clear understanding of state and federal laws and administrative regulations applicable to school funding.

Although it will leave a substantial void in our organization if Deborah should choose to leave, I understand the strain of a long commute and her desire to make a contribution in her home district. I heartily recommend her to you for the position of Treasurer.

Sincerely,

Kathleen Estep

TREASURER/CFO CANDIDATE - SCREENING INFORMATION

Instructions: Please download this form to your computer and save it. Then in the space provided answer the question. If you do not have experience with one or more of the subject areas respond by placing NA for those which are not applicable. Then re-save the document, reattach it to your email and resend it to the K-12 search consultant or fax it to 614-656-7526.

Candidate Name : Mobile Phone: Date:
School Treasurer Experience: ☒ Y or ☐ N ADM of largest district Served:
Latest Experience in what district? How Long?

On what terms was your service with that district ended?

Explain briefly why are you interested in this position?

Have you prepared monthly financial reports for a Board of Education and administration? If yes briefly

discuss your experience in preparing reports:

Have you worked with administration to prepare building and department budgets and the Annual

Appropriation Resolution for a school district? If yes, what was your most recent experience and your role:

Have you prepared financial reports related to school construction funds and budgets? If yes, please discuss the type of reports you have prepared for the administration and Board.

Have you prepared a five-year forecast for a school system? ☐ Y or ☒ N

If yes what was the date of most recent five-year forecast you prepared and for what school district:

Roughly how many staff negotiations have you been involved in and what school district was your most recent negotiations experience in and briefly discuss your role?

Roughly how many levies and types have you been involved in and what was your role?

I have not had the opportunity to be directly involved in a levy, but I am eager to contribute my skills and learn more about the process in the future.

Have you been involved in a school construction program? ☐ Y or ☒ N Was it OSFC? ☐ Y or ☐ N

Discuss your involvement if you answered yes to either of the two previous questions related to construction?

NA

Have you made financial presentations to your Board, administration and/or community? ☒ Y or ☐ N

If you answered yes to the previous question how would you rate your presentation skills and ability to react quickly on your feet to questions and why?

Yes, I present to the board every month and to the Superintendent in weekly meetings. I believe my presentation skills are strong, as I prepare thoroughly and anticipate potential questions. This preparation allows me to respond effectively and confidently to any situation that may arise.

How would you rate your written communication, and have you ever contributed articles on finance in a district wide newsletter or similar publication? Please explain:

I have excellent written communication skills and can adapt them to meet the audience's needs. I contribute to our quarterly newsletter through the "Treasurer's Corner," where I provide engaging finance tips and helpful information to make financial topics accessible and interesting for readers.

How would you implement changes in this district if you saw the need and how would you engage others?

Before implementing any changes, it is crucial to thoroughly understand the background and context of the issue. In our district, the Critical Needs Committee is composed of administrators, teachers, staff, the Superintendent, the Treasurer, and a board member. This committee is where we discuss and evaluate employee needs and identify necessary changes that will benefit both the district and its employees. Engaging with this diverse group ensures that any proposed changes are well-informed and aligned with the best interests of everyone involved.

Have you restructured a treasurer's department including writing or refreshing job descriptions and aligning or changing job duties of existing staff? Please Explain:

Yes, I have restructured the Treasurer's department at Clark County ESC in response to rapid growth, the district has added over 100 positions in the almost 3 years I have been at the ESC. To address this expansion, I was able to promote the payroll position to Assistant Treasurer and created a new Payroll Specialist role. Additionally, I restructured the Accounts Payable position to encompass a broader finance role, ensuring that the department's structure supports our increased responsibilities effectively.

Please explain how often you evaluate your current staff and briefly describe the process you use and how important it is to you to provide feedback to your staff:

I conduct semiannual evaluations of my staff, where we set goals for the next review period to promote continuous improvement and clarity in expectations. By providing ongoing feedback, I ensure that we both stay aligned on performance and objectives. I believe this approach fosters a positive environment that encourages ongoing development and success of the Treasurer's office team.

What five things would you do as Treasurer in first 6 months if you were selected for this job?

1. Review Financials: I would thoroughly review the current financial statements, budgets, and reports to gain a clear picture of the district's financial status. Based on this review I will begin preparing the updated five-year forecast for approval which must be submitted to the Ohio Department of Education by May 31st.
2. Engage with Internal Stakeholders: First, I would work to ensure there is a seamless transition between Kevin and I. In collaboration with the Superintendent, the Board of Education, and department heads I will develop, implement, and monitor the district's policies and procedures based on sound fiscal practices and the analysis of financial resources that support the District's strategic plan for achieving its goals.
3. Understand Current Challenges: As Treasurer, I will be regularly and systematically collecting and analyzing the financial data of the District, prepared to respond to a changing fiscal reality in the short term. Therefore, I will want to identify any existing challenges or concerns within the financial operations by reviewing current District contracts, bargaining agreement and becoming familiar with any program changes. For example, is there anything that we aren't currently doing but should.
4. Set Up Regular Communication Channels: I value communication with all stakeholders. I will establish procedures to facilitate regular and direct communication and collaboration with the Superintendent and Board of Education. I will also establish communication with school personnel and other engaged external stakeholders to communicate the District's strategic plan and collaborate to achieve the District's financial objectives and goals
5. Maintain Commitment to Continuous Professional Development: I would promote high-quality professional development by setting goals for myself and personnel assigned to the Treasurer's office. Here I would follow the ACHIEVE model: action-oriented, consequential, hard not herculean, integrated, explicit, visualized, and endpoint-focused.

In the space provided briefly explain why the Board of Education should consider you for this position and what unique talents you would bring to the district:

The Board of Education should consider me for this position due to my unwavering dedication to both our community and the Bellbrook-Sugarcreek School District, along with my deep-rooted passion for ensuring its ongoing success. Having raised three children who graduated from this district, I have a personal and meaningful connection to its achievements. This district has played a pivotal role in shaping my children's education and future, and I am fully invested in its continued excellence and growth. My desire to contribute to this community goes beyond professional aspirations—it's about giving back to the district that has had a lasting impact on my family. In addition to my personal ties to the district, my unique experiences have further prepared me for this role. Having lived in various countries and experienced different cultures, I have developed a broad perspective that allows me to approach challenges with creativity and adaptability. Professionally, I bring over 8 years of experience working in a variety of Ohio schools, including an ESC, a charter school, a career center, and traditional public schools. This diverse background has given me a comprehensive understanding of all aspects of the Treasurer's office and the distinct needs of different educational settings. I have successfully managed financial operations, budgets, and audits, and I am adept at fostering collaborative relationships with administrators, staff, and stakeholders. My ability to balance attention to detail with big-picture thinking ensures that I can meet the district's immediate financial needs while also planning strategically for the future. I am highly organized, adaptable, and driven by a strong work ethic. My goal is to support the financial well-being of the district while upholding transparency, accountability, and fiscal responsibility. I am confident that my blend of personal investment and professional expertise will enable me to contribute meaningfully to the Bellbrook-Sugarcreek School District, ensuring its financial health and future success for years to come.

When would you be available to start? 12/1/2024 perhaps with supplemental days as soon as 11/15.

What base salary expectation would you have? \$110,000-\$120,000

Please return this information to the K-12 consultant or fax it to 614-656-7526. Thank you for helping us get to know you better!

STATE OF OHIO DEPARTMENT OF EDUCATION
5 Year School Treasurer School Treasurer License

DEBORAH CARSON

THIS LICENSE AWARDED TO

OH3362058

EDUCATOR STATE ID

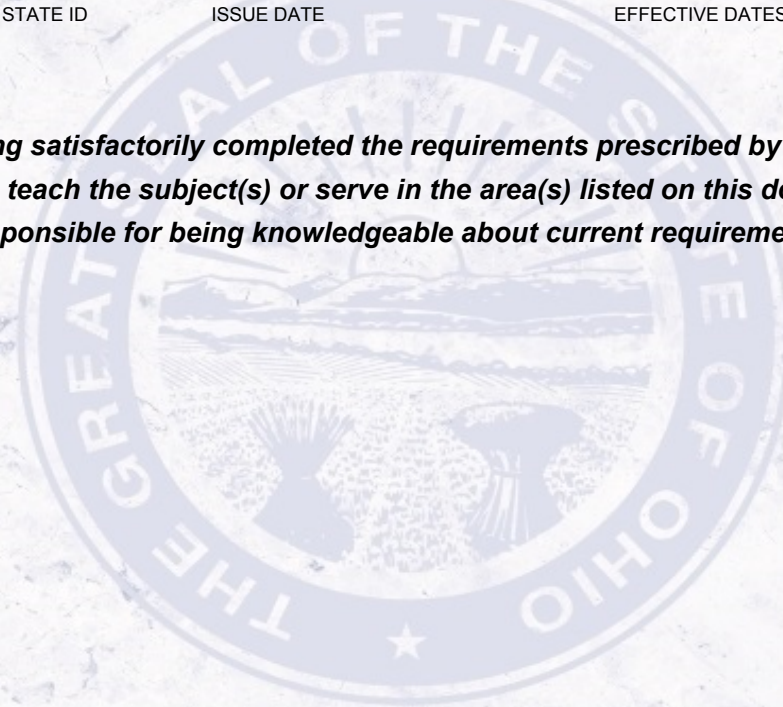
06/25/2020

ISSUE DATE

07/01/2020 to 06/30/2025

EFFECTIVE DATES

The holder of this credential, having satisfactorily completed the requirements prescribed by The State Board of Education and the laws of Ohio, is authorized to teach the subject(s) or serve in the area(s) listed on this document for the period specified. The holder of this credential is responsible for being knowledgeable about current requirements for maintaining the credential.



Paolo DeMaria

Superintendent of Public Instruction

This official document was created by the Ohio Department of Education and represents a true copy of a legal educator license as referenced in Ohio Revised Code Section 3319.36.

Credential # 21877901

Employers may verify this credential by going to Educator Profile on education.ohio.gov and ensuring that the unique credential number appearing on this credential matches the person's records in Educator Profile, which is the official record of educator credential history.