

Donna First

8450 Koster Ln. Dayton, OH 45458 • 937-672-8559 • donna1st7@yahoo.com

Dear Board of Education,

I am writing to express my interest in the school treasurer position at Bellbrook-Sugarcreek Local Schools. I have 25 years of experience working with public school systems and spent my first 10 years at Bellbrook-Sugarcreek Local Schools. After completing the required coursework, I received my Ohio School Treasurer License in February 2021.

Initially, I entered college as a dual major in business and psychology. My husband was transferred to the Dayton area before I could complete my degree. Eager to start my life after college, I finished my bachelor's degree in psychology and took a position with a non-profit organization as a director of care facilities. Looking to advance I applied for and was granted, a fellowship at the University of Dayton. I was drawn to school psychology because I enjoyed interpreting the quantitative information for the parents and educational teams. As my career progressed, my initial interest in business continually resurfaced with each position and grew more focused on the financial management aspects of running a school district.

My skills and interests are best suited for a position as a school district treasurer. I currently oversee aspects of district purchasing procedures, manage federal grant funding programs, complete state compliance reporting regarding funding, and manage the district E-Rate program to obtain discounted infrastructure technology for the district. The district has also asked me to perform budget analysis tasks and create a district purchasing plan.

I am excited by the prospect of returning to Bellbrook-Sugarcreek Local Schools and serving the district as your school treasurer.
Thank you in advance for your consideration.

Sincerely,

Donna First

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Professional Summary

Professional educator with 25 years of experience in Ohio public school systems.
Licensed by the Ohio Department of Education as a School Treasurer.

Skills/Experiences

- Extensive experience with public school systems in Ohio and communicating with stakeholders.
- Knowledge of Public Sector Accounting procedures for school districts as well as Private Sector Accounting (GAAP) procedures.
- Experience with procurement policies, contracts, and bidding procedures.
- Knowledge of financial reporting, budget, and forecasting software.
- Management of State and Federal Grants.

Education

Ohio School Treasurer Pathway	OASBO/Clark State Accounting	Dec. 2020
Ohio Superintendent Licensure Program	Wright State University	Jun. 2013
Ohio Principal Licensure Program	McGregor/Antioch University	Jun. 2007
M. S. School Psychology	University of Dayton	Dec. 1997
B. A. Psychology	Wright State University	Jun. 1995
Business/Psychology Major	Kent State University	Jun. 1992

Work History

Yellow Springs Exempted Village School District		
Student Services & Operations Director		2015-Present
Director Cedar Cliff Local School District		
Curriculum & Special Education Director		2013–2015
Fairborn City School District		
Special Education/Preschool Director		2011-2013
Greene County Educational Service Center		
School Psychologist & Program Director		1999-2011

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

DONNA JEAN FIRST

THIS LICENSE AWARDED TO

WR1012284

EDUCATOR STATE ID

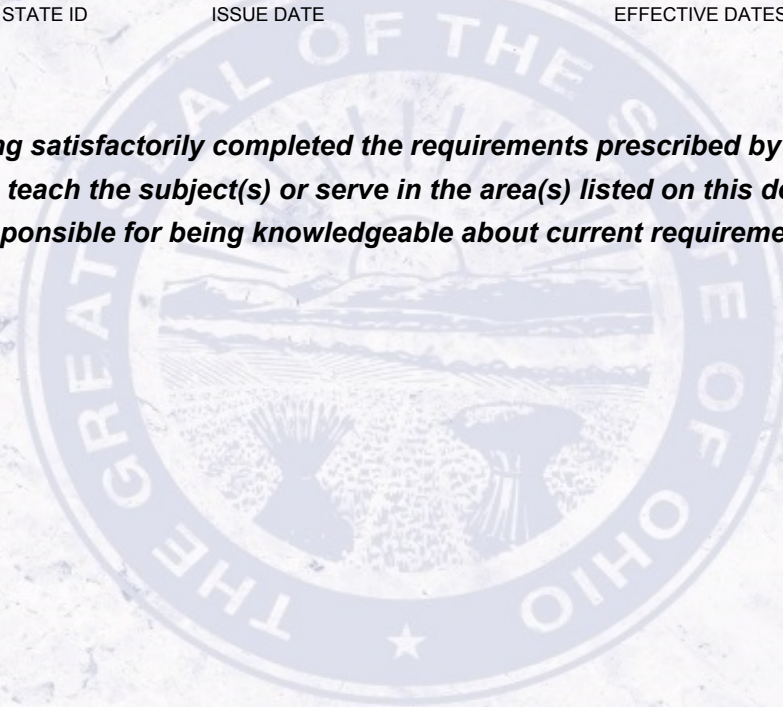
02/22/2021

ISSUE DATE

07/01/2021 to 06/30/2026

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 # 21952485

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.

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Dr. Terri Holden

Work: 937-767-7381
Cell: 513-967-4576

Yellow Springs Schools

888 Dayton St. Suite #106
Yellow Springs, OH 45387

THolden@ysschools.org

Mario Basora

Cell: 513-479-7133

**Previous Superintendent
Yellow Springs EVSD &
Huber Heights City SD**

Basora93@gmail.com

Kevin Liming, Treasurer

Work: 937-848-5001x6113
Cell: 937-238-0056

Bellbrook-Sugarcreek Schools

3757 Upper Bellbrook Rd.
Bellbrook, OH 45305

Kevin.Liming@bss.k12.oh.us

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 : Donna First Mobile Phone: 937-672-8559 Date: 09/13/2024
School Treasurer Experience: ☐ Y or ☒ N ADM of largest district Served: 4,474 (Fairborn)
Latest Experience in what district? Yellow Springs EVSD How Long? 9 years

On what terms was your service with that district ended?

Currently, employed at Yellow Springs EVSD. The district is aware that I am applying for this position.

Explain briefly why are you interested in this position?

I previously worked with Bellbrook-Sugarcreek Schools would like to return to the district. The current treasurer, Kevin Liming, has been a mentor to me. I understand the district and the skills needed to be successful 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:

I attend our board meetings and receive a copy of the financial reports prepared by the treasurer. I prepare and present reports to the board and provide information for the board agenda to be added to the superintendent's report or the treasurer's reports regularly.

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:

While I am not the treasurer currently preparing the annual appropriation resolution, I am familiar with this as well as budgeting. I support the district with budget analysis tasks to help the superintendent and administration track school year spending and project costs for making spending decisions.

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.

While I am not the treasurer currently responsible for school construction funds and budgets, our district is currently going through a facilities project which has provided me with valuable experience.

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:

I have prepared a five-year forecast for the OASBO school treasure pathway program.

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?

I have not participated in staff negotiations. I am familiar with the process from working on administrative teams in three school districts. I am very familiar with the negotiated agreements unions for both certified staff and classified staff.

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

Bellbrook (1), Cedar Cliff (1), Fairborn (1), and Yellow Springs (3)
Levy committee and district administration.

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?

Yellow Springs has a current construction program going on. I am part of the administrative/leadership team .

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?

I enjoy interpreting information for the community and answering questions.

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 written articles for school district websites, newsletter, and other local professional publications over the years on a variety of topics, but not as a school treasurer.

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

I would work collaboratively with the board, superintendent, administrative team to develop a plan based on targeted outcomes based on particular need.

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

I have restructured departments within a school district including updated or creating job descriptions and/or determining how to set appropriate salary schedules.

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 evaluate my staff annually as a requirement. However, part of providing oversight to staff is continually monitoring how well objectives and designated tasks are being completed. This is ongoing with feedback and problem-solving with individuals and groups when needed. Providing feedback to my staff and being receptive to their input is vital to building an effective team.

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

- 1) Meet with the outgoing treasurer as well as the current treasurer department staff to review district information and current processes.
- 2) Make sure that roles /names in state OEDS, financial software, bank accounts etc. switched for my access.
- 3) Meet with the superintendent and board president to ensure that I'm up to date with information related to the board and business of the district.
- 4) Attend board meetings, provide month reports --prepare other information as requested by the board
- 5) Update five-year forecast, close out fiscal year, prepare budgets and appropriations for upcoming school year and work with the appropriate staff (treasurer dept or HR) for next year contracts and salary notices to go out.

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:

My years of experience in public education administration provides me with a solid understanding of all departments within a school district. This gives me a broad base of understanding and unique perspective for making financial decisions that support the district's strategic plans. I understand the Bellbrook-Sugarcreek community and have experience successfully communicating with the staff and community. Although I have not held a school treasurer position, my current district is supportive of my interest in becoming a school treasurer and provides me with work experiences that are more often carried out by the treasurer's department. I regularly attend the Greene County Treasurer's meeting and have a variety of professional contacts/supports.. I am also the treasurer of a local HOA. I stepped in as the treasurer in a community HOA in Centerville where the board and community relationship was strained. I successfully work with the board president to change the negative atmosphere, restore the communities' confidence in the board as well as it's management of the HOA finances.

When would you be available to start? January 2025 Full-Time -- One-day a week Immediately

What base salary expectation would you have? \$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!
