



Ohio School Boards Association Capital Conference and Trade Show

November 7 – 10, 2010

Greater Columbus Convention Center
Columbus, Ohio

Ohio leads the way!

Organizational outlook

Wednesday, November 10, 2010

9:00 a.m.

C 123—125

Julia Simmerer, director, Office of Educator Standards, ODE

John Soloninka, associate director, Center for the Teaching Profession, ODE

Gary Ghizzoni, treasurer, Trumbull Career & Technical Center

Joy Clickenger, treasurer, Cuyahoga Valley Career Center

Patrick East, treasurer, Brunswick City

James Russo, business manager, Warrensville Heights City

Executive searches

OSBA search consultants provide search services that can help your board and administration organize a search process and find highly qualified candidates for superintendent, treasurer, business manager or principal vacancies.

OSBA has conducted over 700 successful searches, since the inception of the service in 1981. This service reflects OSBA's long-term commitment to strong, mutually beneficial board-administrator relationships.


Contact Al Meloy at (614) 540-4000 or (800) 589-OSBA for more information.

OSBA Mission

OSBA leads the way to educational excellence by serving Ohio's public school board members and the diverse districts they represent through superior service and creative solutions.

Ohio School Boards Association


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Ohio Leads the Way!
Professional Standards for School Treasurers and School Business Managers

OSBA Capital Conference
Wednesday November 10, 9:00 AM
Rooms C 123-125

Ohio Association of School Business Officials

HB 1 Mandate **oasbo** 

- ◆ Professional Standards
 - Responsibility given to Educators Standards Board (ESB)
 - OASBO Recommends New Board Member to ESB
 - Sub-Committee created to develop standards
 - Chair-Newly Appointed OASBO Representative
 - Three School Business Officials (OASBO Recommended)
 - Three members of the ESB

Process to Develop Standards **oasbo** 

- ◆ OASBO/ODE Create a Writing Committee
 - 20 Member Committee
 - 16 School Business Officials
 - Representative from BASA, OSBA, ODE and AOS
- ◆ Work Began October, 2009
- ◆ Monthly Meetings (except December) until completed April, 2010
- ◆ Stakeholders Meeting-May 7, 2010
- ◆ Posted on ODE Web Site for Comment

Process to Develop Standards



- Final Writing Committee Meeting-June 4, 2010
 - Reviewed all input from outreach activities
 - Made final recommendation
- Sub-committee Work
 - Began January, 2010
 - Met Monthly and Reviewed Writing Committee Work
 - Final Meeting-June 28, 2010
 - Recommended Final Draft to ESB

Process to Develop Standards



- ESB Reviewed during the process
- ESB passed a resolution to recommend standards to State Board Of Education
- State Board of Education
 - Review at September, 2010 Meeting
 - Adopt Standards at October, 2010 Meeting
- Publication of Standards to be Issued December, 2010 or January ,2011

Writing Team Members



Joy Cickenger – Treasurer/CFO Cuyahoga Valley Career Center	Ken Cickenger – Business Manager Euclid City Schools	Mark Donnelly – Business Manager Chagrin Falls Exempted Village Schools
Patrick East – Treasurer/CFO Brunswick City Schools	Gary Gebhart – Business Manager Great Oaks Institute of Technology	Ryan Ghizoni – Treasurer/CFO Fairview Park City Schools
Jeff Gordon – Business Manager Clermont Local Schools	Tamra Hurst – Business Manager Stark County Educational Service Center	Paul Lockwood – Representative OSBA
Sandy Lynskey – Representative Auditor of State	Steve Osborne – Treasurer/CFO Dublin City Schools	Dorothy Pietrykowski – Treasurer/CFO Northwest Ohio Educational Service Center
Cindy Ritter – Treasurer/CFO Marysville Exempted Village Schools	Jim Russo – Business Manager Warrensville Heights City Schools	Chuck Stewart – Business Manager Vandalia-Butler City Schools
Marion Stout – Business Manager/ Director of Human Resources Troy City Schools	Steven Thompson – Superintendent Chagrin Falls Exempted Village Schools, Representative, BASA	Mike Watson – Fiscal Consultant, ODE Center for School Options and Finance
Rick White – Treasurer/CFO, Mid-East Career and Technology Centers	Diana Whit – Treasurer/CFO Trotwood-Madison City Schools	

**Ohio Educator Standards
Board Subcommittee for
School Treasurers
and School Business
Managers Standards**



- Valerie Browning, Superintendent, Kings Local Schools
- Joy Clickenger, Treasurer/CFO, Cuyahoga Valley Career Center, OASBO Appointment
- Patrick East, Treasurer/CFO, Brunswick City Schools, OASBO Appointments
- Mary Ann Ellis, Teacher, Cincinnati Public Schools
- Gary Ghizzoni, Chair of Subcommittee, Treasurer/CFO, Trumbull Career and Tech Center, OASBO Appointment
- Kevin Reidy, High School Principal, Hillsdale Local
- Jim Russo, Business Manager, Formerly-Warrensville Heights City Schools, OASBO Appointment

**Organization and
Structure of
Standards**



- Standard: The Standard expresses a definable goal or area of responsibility of school treasurers and school business managers.
- Narrative Summary: The Narrative Summary more fully describes the content of and rationale for each Standard.
- Elements: The Elements are the statements of the skills or characteristics that define effectiveness in the Standard.
- Indicators: The Indicators show the knowledge and skills of each Element in practice. The Indicators are observable or measurable statements that serve as tools in discussions of effective school treasurers.

**Standards for
School Treasurers**



- **Standard 1. Leadership** School treasurers participate in a leadership role within the district.
 - Elements of Standard 1
 - Participate as an integral member of the district leadership team.
 - Work with the district superintendent and board of education, with input from other stakeholders, to review, develop, align and implement policies and procedures.
 - Participate with the district superintendent and the board of education in the development and implementation of the district strategic plan.
 - Establish and manage sound fiscal practices to support the educational process.
 - Lead and manage personnel under direct supervision of the treasurer.
 - Support the effective use of data.

Standards for School Treasurers

• **Standard 2. Financial Management** School treasurers demonstrate a clear understanding of financial resources and manage those resources in collaboration with the board of education and district leadership.

- Elements of Standard 2
 - Collect, analyze and interpret financial data for budgeting, forecasting and decision-making.
 - Effectively manage district financial accounts including: cash, budgetary, debt service, revenue and grant management.
 - Demonstrate knowledge, performance and accuracy of standard accounting practices, auditing procedures and financial reporting.
 - Demonstrate knowledge of and compliance with state and federal laws.

Standards for School Treasurers

• **Standard 3. Facilities, Property and Capital Asset Management** School treasurers provide fiscal leadership in the management of capital assets and support services.

- Elements of Standard 3
 - Acquire and maintain building and capital assets.
 - Secure financing for capital projects.
 - Develop and monitor risk management practices to protect capital assets.
 - Provide financial oversight and analysis of fiscal implications to the district support services.

Standards for School Treasurers

• **Standard 4. Communication and Collaboration** School treasurers communicate and collaborate effectively with the board of education, district leadership and stakeholders.

- Elements of Standard 4
 - Demonstrate competence in the communication of financial reports to all stakeholders.
 - Communicate effectively and openly while demonstrating a willingness to collaborate with internal stakeholders.
 - Communicate effectively and openly while demonstrating a willingness to collaborate with external stakeholders.

Standards for School Treasurers



♦ **Standard 5. Professionalism** School treasurers are committed to a high level of professionalism in their conduct and adhere to established ethical standards.

- Elements of Standard 5
 - Understand, uphold and comply with professional ethics, including the Licensure Code of Professional Conduct for Ohio Educators (LCPCOE) and the Ohio Ethics Laws.
 - Model and expect fairness, honesty and consistency in the performance of duties.
 - Maintain compliance with applicable local, state and federal laws, rules and regulations and district policies and procedures.
 - Maintain a strong commitment to professional development.
 - Collaborate with peers for the advancement of the profession.

Standards for School Business Managers



♦ **Standard 1. Leadership** School business managers participate in a leadership role within the district.

- Elements of Standard 1
 - Participate as an integral member of the district leadership team.
 - Participate with the leadership team in the development and implementation of the district strategic plan.
 - Lead and manage personnel under direct supervision of the business manager.

Standards for School Business Managers



♦ **Standard 2. Facilities Management** School business managers demonstrate a clear understanding of facilities management.

- Elements of Standard 2
 - Acquire, maintain and oversee construction and/or renovations on buildings and other capital assets.
 - Manage energy and environmental programs.
 - Develop and manage partnerships with private and public sectors to enhance resources related to the facilities and equipment.
 - Develop plans for maintenance expenditures.

Standards for School Business Managers



• **Standard 3. Business Operations** School business managers provide direction to support services and guide the business operations of the district.

- Elements of Standard 3
 - Provide oversight to custodial/maintenance departments.
 - Provide oversight to food service department.
 - Provide oversight to transportation department.
 - Provide support to and collaborate with technology department.
 - Provide support to human resources for non-teaching personnel.
 - Demonstrate a clear understanding of financial resources and planning.

Standards for School Business Managers



• **Standard 4. Risk Management and Safety/ Security** School business managers develop strategies and implement procedures to limit district liability and maintain a secure school environment.

- Elements of Standard 4
 - Ensure the risk management program addresses safety and security.
 - Communicate the risk management program to all stakeholders.
 - Participate in the development of safety and emergency management plans.
 - Develop and monitor risk management practices to protect district resources.

Standards for School Business Managers



• **Standard 5. Communication and Collaboration:** School business managers communicate and collaborate effectively.

- Elements of Standard 5
 - Demonstrate competence in the communication of operational issues to all stakeholders.
 - Communicate and collaborate with internal and external stakeholders.

Standards for School Business Managers



- **Standard 6. Professionalism** School business managers are committed to a high level of professionalism in their conduct and adhere to established ethical standards.
- Elements of Standard 6
 - Understand, model, uphold and follow professional ethics including the Licensure Code of Professional Conduct for Ohio Educators.
 - Model and expect fairness, honesty and consistency in the performance of duties.
 - Maintain compliance with applicable local, state and federal laws, rules and regulations and with district policies and procedures.
 - Maintain a strong commitment to professional development.
 - Collaborate with peers for the advancement of the profession.

Self-Assessment and Professional Development




- **Step 1: Examine Data**
 - Treasurers and business managers should self-assess using the rubric provided in the publication and evaluate available data to determine the specific needs in their districts related to their work.
- **Step 2: Determine Learning Priorities**
 - Treasurers and business managers should analyze the data collected in Step 1 to identify specific goals for professional learning.
- **Step 3: Align Initiatives**
 - Treasurers and business managers should use the information gained from Steps 1 and 2 to identify specific actions and available activities that will allow for their professional learning and growth.
- **Step 4: Develop Implementation Strategies**
 - Given the results of the work done in Steps 1 through 3, treasurers and business managers should develop specific implementation strategies and plans for evaluation.
- **Step 5: Monitor, Assess and Reflect**
 - Treasurers and business managers should plan the ways in which they will evaluate the effectiveness of their personal professional development effort.

Next Steps



- ◆ Develop an evaluation system using the Professional Standards
- ◆ Use the Standards to design Professional Development Curriculum

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- ◆ Thank You
- ◆ Questions ?????
