

**ALASKA COUNCIL**



**OF SCHOOL ADMINISTRATORS**

**The Alaska Council of School Administrators (ACSA) serves as an umbrella for four of Alaska's premier educational leadership organizations, including:**

- **Alaska Association of Elementary School Principals**
- **Alaska Association of Secondary School Principals**
  - **Alaska Superintendents Association**
- **Alaska Association of School Business Officials**



# Business Manager/Superintendent Communications

Keys To Success!



**If you can't describe what you are  
doing as a process, you don't know  
what you're doing.**

**W. Edwards Deming**



*Time left ...*

3: 00



# Overview

Your relationship with your superintendent is one of the most important factors in successful performance and satisfaction.

Our session will discuss how business managers can develop and maintain good communications with their superintendents.



# HUGE Job: Business Manager

- **Requirements: Must perform...**
  - Budget development and management
  - Accounting and payroll supervision
  - School finance and taxation
  - School finance reporting
  - Accounting and payroll supervision
  - Bid and purchasing practices
  - Insurance coverage
  - Plus “OTHER DUTIES” as assigned
- **Business Manager must possess...**
  - Language skills
  - Mathematical skills
  - Communication skills
  - Reasoning skills
  - Plus – proficiency with computer applications, application of research and theory, ability to maintain effective working relationships, speak clearly and concisely in both oral and written communication, etc., etc.

**Superintendents want a business manager that help them manage the business, complement their skills, think strategically, and offer leadership , while still providing all the requisite financial skills.**



# Business Manager – Who Are You?

- **Core Values – honesty, integrity, respect**
- **Openness, resourcefulness, “CAN DO” attitude**
- **One set of numbers; one budget (transparency)**
- **Can the Board and Superintendent go to the bank with your budget; if not, where are the “soft” spots**
- **No surprises for Superintendent or Board – no hidden funds**
- **Owning one’s mistakes or miscalculations – superintendent**
- **Treating the district’s bank account as your own**
- **Team Leadership – background or front and center**
- **Get out in the schools; experience the excitement**



# Topics for Today

- Turnover
- Educational Decisions
- Communications
- Newbies
- Reporting
- Forecasts
- Processes
- Know Your Details
- No Surprises
- Run Your Office
- Clean Audits
- Board Help
- Perspective





# Turnover

- Superintendents have higher turnover than business managers, and don't generally spend as much time developing budgets, approving expenditures, etc.
- Be cognizant that this hands some unofficial authority for decision making to the business office

***When business managers are perceived as making district decisions, it causes problems***



# Governance: Board/Staff Context

- **Superintendent (with the leadership team) and School Board make-up the district's "strategic leadership" team...**
  - Continuous, close and creative collaboration
  - Neither partner can do it alone
  - Input needed from the Board in making complex, high-stakes decisions with long-term impact
- **Experience teaches us that the Board-savvy Superintendent above all else fulfills four conditions...**
  - Brings the right attitude to working with the Board
  - Makes governance a top priority
  - Focuses consciously on the human dimension of the relationship
  - Functions as a full-fledged, contemporary CEO
- **By extension, the Business Manager follows suit**



# Educational Decisions

- In many cases, the best educational decision is also the best business decision, but not always.
- Business factors influence educational decisions, but don't dictate them.
- Stakeholders should understand that the Superintendent is making the best educational decisions, factoring in all information including the business office

***The Superintendent is the educational leader of the district and is accountable to make the best educational decisions***



# Synergistic District Management

**Superintendent and Business Manager must have a good working relationship maintained by...**

- **Trust – the quality of the trust cannot be understated**
- **Ability to push back on each other during robust discussions**
- **Paying attention to the psychological care and feeding of each other**
- **Ensuring effective two-way communication**
- **Mapping out the structures and processes to do the work**

**Superintendent must feel firstly, the quiet confidence that the business manager is on top of the numbers, that there would be no surprises; and secondly, the ability to discuss options and issue in confidence, and receive the value of a robust discussion with someone who is truly a thought-partner.**



# Why Good Communication Matters

- **Communication: Approached Creatively & Strategically**
  - Integral “front-end” part of all important decisions
  - If you fail to plan, you plan to fail
- **Excellent Communication Starts with Relationships**
  - Create and nurture a strong, trusting relationship
  - Healthy relationships help make tough decisions bearable
  - Open the “door” and involve stakeholders – transparency
  - Personalize the use of today’s media for effective communication

**The relationship test – Is the business manager the first person to whom the superintendent turns to for a second opinion or for a no-holds-barred discussion on a burning issue?**



# Communications (1)

- Establish a regular meeting time, preferably weekly
- Always have an agenda
- Keep to a time limit

***Put yourself in your superintendent's shoes –  
what matters most***



## Communications (2)

- Say it in five minutes or less
- Give a bottom line – in the black or in the red
- If numbers have changed – why?
- If adjustments are needed, bring options with justification and recommendation

***Don't bring just the problem, bring a solution!***

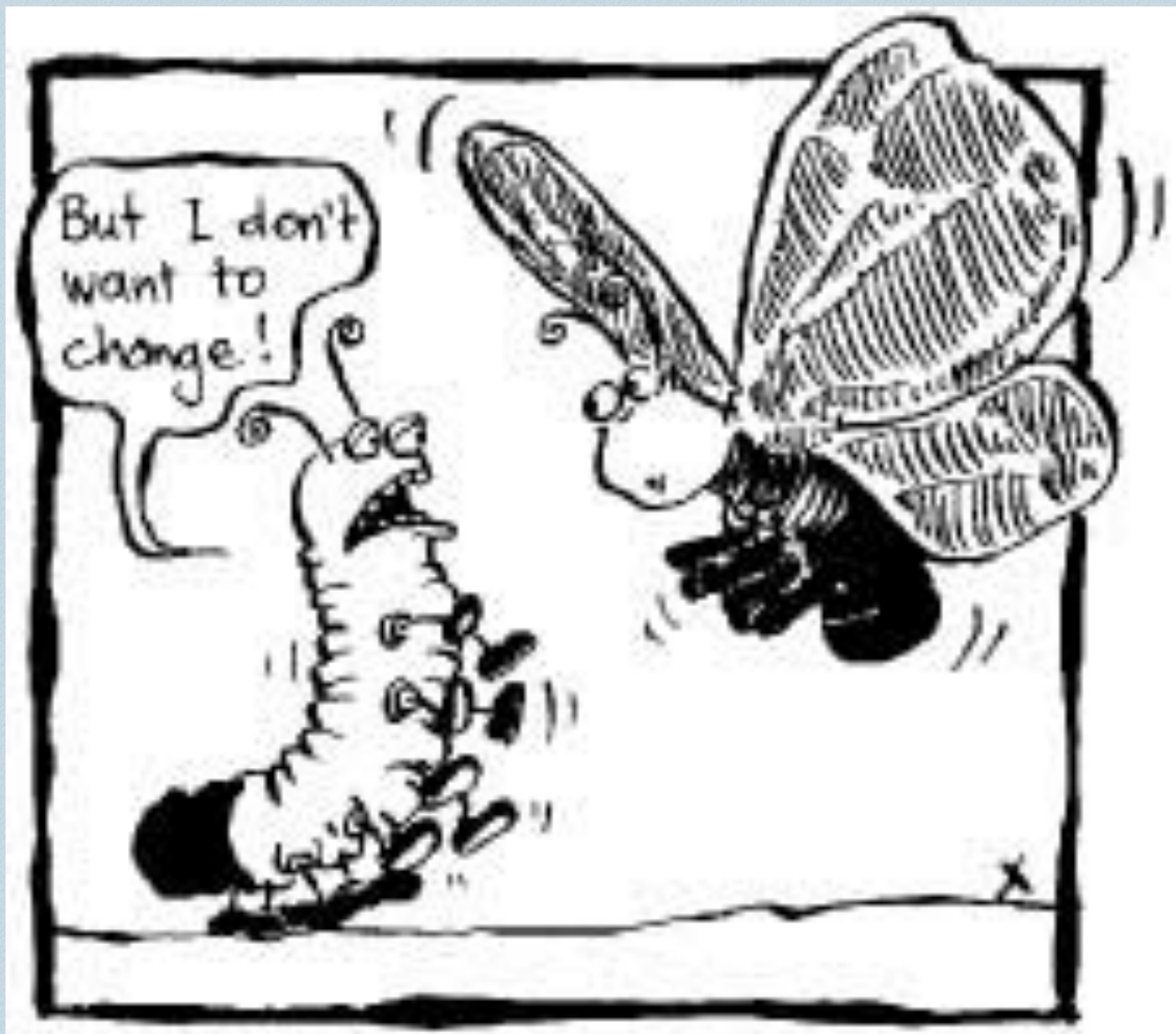


## Communications (3)

- Finance has its own language – help your superintendent with basics of such as stop loss, etc.
- Needs to be on top of trends and concerns
- Messaging for public- what is the district's fund balance, in which categories, etc.

***Know your superintendent's initiatives***







# Newbies

- Understanding the funding formula- especially for those not trained in Alaska
- Take time to educate new superintendents about the basics of the budget and the Alaska Chart of Accounts

***Alaska really is truly unique!***



# Reporting

- Monthly Actuals v. Budget to superintendent and all department heads
- Develop a flash report that provides key information to superintendent on one page

***Your colleagues rely on your reporting!***



## Forecasts

- Keep a reasonable degree of conservatism
  - But remember, being conservative can foreclose options
- Develop a mutual full understanding of forecasts – risks, high side v. low side



"THERE IS NOTHING  
SO TERRIBLE  
AS ACTIVITY  
WITHOUT INSIGHT."

-Johann Wolfgang von Goethe  
German Playwright, Poet, Novelist  
and Dramatist. 1749-1832



## Processes

- Use a process to adjust budget line items roughly four times a year
- Need clear processes to distribute information
- Publish budget process with timelines
- Publish purchase order processes – RFP's, PO's, contracts, etc.
- Publish travel procedures



# Know Your Details

- School Foundation Formula
- Your District's Vital Statistics
- Regulatory and Legislative Updates from a Financial Perspective (KGB, HB278 examples)
- Twenty Day Count Nuances
- PILT
- Impact Aid



## No Surprises

- Get bad news on the table immediately
- Price of early information is that it may change, but early and tried up beats late and perfect





# Run Your Office

- Research special service contracts for best deal
- Technology updates for business department as appropriate
- Discuss investment earnings and potential changes
- Use grant funding to replace 100 funds as appropriate



## Run Your Office - Continued

- Analyze energy and fuel bills from schools to reduce costs
- OASIS – keep student enrollment documents updated
- Plan for special project saving within 502 accounts
- Monitor CIP project funds



# Clean Audits

- Know your auditor
- Don't miss deadlines
- If finding is coming, heads up



## Board Help

- Chain of command
  - Business Managers work under the direction of the Superintendent - unless there is a breach of ethics, NEVER go directly to the board
- Superintendent should be aware of any issues involving board members (travel, pay, family, etc.)

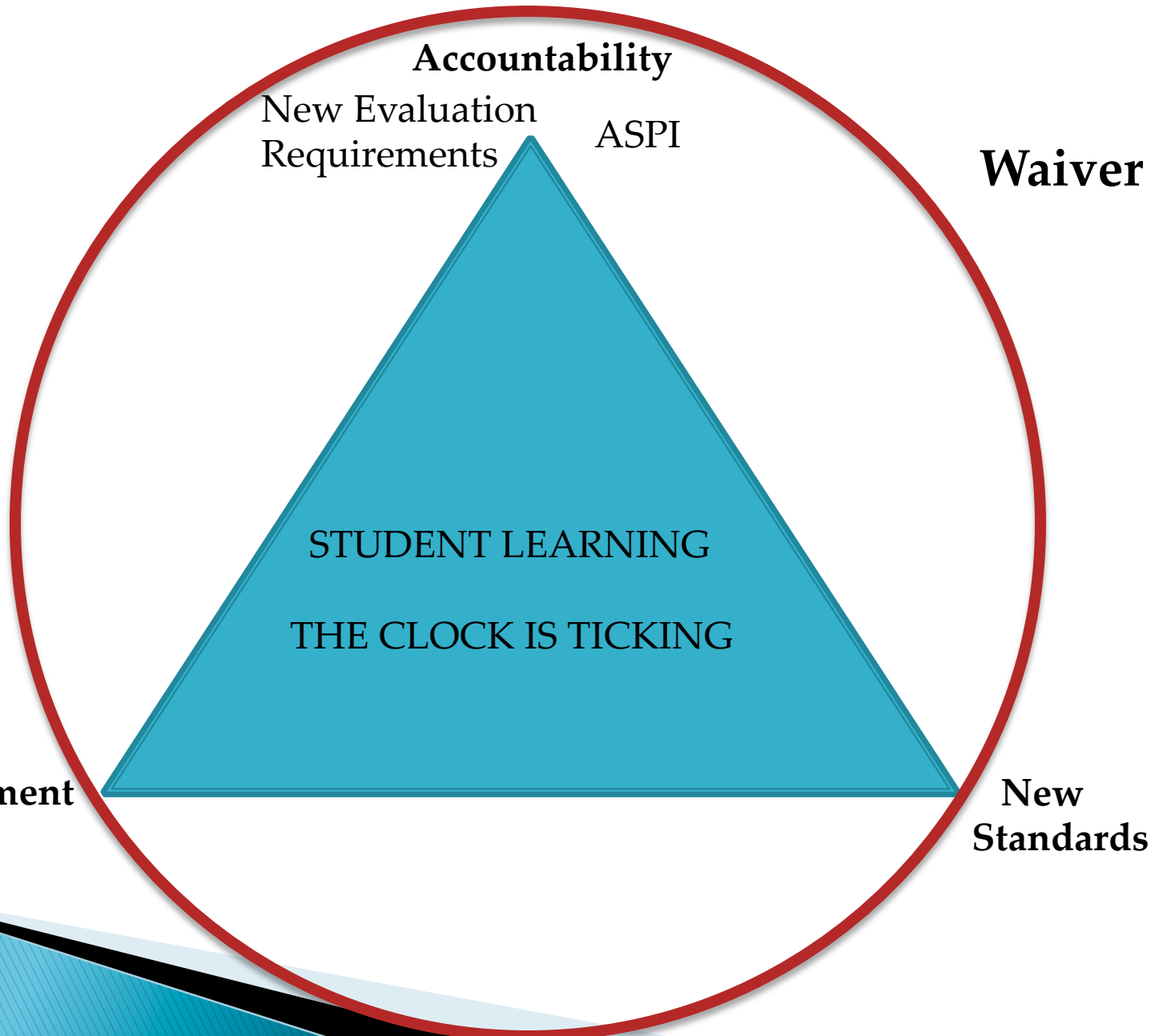


## Perspective

- Your superintendent has many, many demands on their time
- Their focus is strategic and educational
- Your job is to keep the house in order so they can deliver

***Let me offer the following examples***

# DEED'S PERFECT STORM



# Changes from DEED- It's All New

Standards



New standards in  
language arts and math  
2012

Assessments



New tests to replace the  
SBAs in effect spring  
2015

Evaluation



New evaluation regs  
that will include student  
learning data 2016

Reporting



AYP is gone  
ASPI is here  
Now  
More AMOs



# Times Are Changing

- **Growing public expectation for improvements in achievement**
- **Growing demands for choice/alternative education settings**
- **Growing Federal & State demands, often without sufficient funds**
- **Growing range of what constitutes school responsibility – families and society are asking schools to do more**
- **Growing realization that schools must address health & safety issues**
- **Growing call for educational reforms**
- **Growing concern that education has an insatiable appetite for \$\$**





# Message for Today's Business Officials

- **Given financial and economic challenges, business officials must provide:**
  - Strong fiscal leadership
  - Effective management of available resources
  - Greater productivity
- **Business Officials are in a strong position to:**
  - Recognize opportunities for operational improvements
  - Implement practical measures to deliver services more efficiently

**School Business Official – Someone who can mobilize all available resources to meet the growing demands for effectiveness and accountability!**



## Close

- Make payroll on time – if employees are unhappy, everyone is unhappy, your boss will be unhappy!
- If there is a problem, work through it together - nobody is perfect but never throw each other under the bus

Keep a sense of humor!



## Getting It Right Matters

**Creating the environment necessary for outstanding student achievement requires that we build support through strong communications by involving everyone in the process and keeping our eye on the mission at hand!**

**“Preparing Our Students for the World Ahead”**

# Thank you!

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