

Managing the School Business Manager Role
ALASBO School Business Academy
December 2, 2018

Overview of the Business Office – tying it all together with a goal of sanity targeting work-family balance ☺

Instruction – mostly SEP except for budget

Instructional Support – the business side of school districts = business manager responsibility

School business annual calendar

Importance of the role of business manager – district and community – you are a leader; it comes with the job

Blunders & pitfalls for the new business manager & how to avoid them – bottom line is communication with goal of openness and transparency

Everything you do is based on a standard of some sort that you can always refer back to:

Code of Ethics – ASBO document attached

Professional Standards – ASBO document available at www.asbointl.org (information included)

Generally Accepted Accounting Principles – Document included

Chart of Accounts – to be covered later today

Board Policy – be sure to read it all and know the sections that pertain to you: the business section is the usually responsibility of the business manager

Strategic Plan – should be basis for district operations and budget (stabilizes the budget process from wants to identified and planned needs)

Standard Operating Procedures – outline district processes
ALASBO examples

Internal Controls – protect public, district, **and you**

Politics Internal and External – what you do in public matters, even what you do on a personal level

Superintendent

Board Relations

Two (2) year learning curve

Paperless – saves you time.....**but** you have to decide you are going to do this

Website – keeper of all things pertaining to the school district: business manager is responsible for business office section content. Train staff to look there first.

Electronic Filing – grants, payroll, etc.

Manuals – electronic and posted to website

Forms Folder – electronic forms

Auditors want electronic copies

Revisit your software(s)...probably using at minimal levels

Time Management

Start your day with a clear focus

Minimize procrastination – what is the problem

- You don't know what to do
- You don't know how to do it
- You don't have the authority or the resources
- You're afraid

Electronic calendar – schedule tasks

Manage External Time wasters

Close your door and put your phone on record

5-minute planning tool

It is ok to say 'No'

Triage your email and turn off the 'dinger'

Try not to multi-task; working on one thing at a time results in you being calmer, more productive, and strangely enough you'll will get more done in less time.....really!

Making changes

Research

Implementation Plan

Communication Plan

Training

Retraining and training for new hires

Remember a sense of humor often saves the day. ☺

Resources

ALASBO Mentor

ALASBO Website – www.alasbo.org

ASBO Website – www.asbointl.org

PASBO Website – www.pasbo.org

Resource Center – RFPs for audit, banking, etc.

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Here are some time management suggestions compiled by Claire Hertz, CFO with the Beaverton School District:

- Create a to do list and review daily - keeping important items on the top of the list - these will help you reach your goals for the year
- Remember urgent is not always important - if all I worked on was urgent, I would never get to the more strategic work of the financial leader of the district
- Ignore email for blocks of time to get high level thinking work done - it's easy to be distracted
- Email and urgent tasks - touch it only once - delegate or get it done as received
- Save everything you do electronically - most likely you will do it again in the future
- Document with notes for tasks to be repeated in the future (use cell notes in Excel)
- Schedule weekly meetings with direct reports - give quality time, so they can get their work done
- Empower staff with the ability to make decisions - ask staff what they think we should do when they bring an issue to your attention, most times they already know the answer
- Be consistent - staff appreciate knowing how you're going to respond to an issue based on previous actions
- Block out time on your calendar to complete a project
- Use the end of the day or the end of the day as your quiet time to clear large projects
- Set your office clock 5-10 minutes fast so are on time to meetings
- -When financial projections change significantly for the good or bad, verify your numbers are correct AND tell your superintendent right away. Be ready to explain why the numbers have changed. Superintendents do not like surprises when it comes to fund balance. Neither do board members.
- Remember the [80/20 rule](#)

Source: ASBO Digest

Here are some time management suggestions compiled by David Janek, Business Manager for the Rapid City Area Schools, South Dakota

Managing priorities is not unique to the School Business Official. Every executive in either the private or public sector at some time in their career will be challenged by more work to do than hours in the day. I think there are some keys to successful planning that I have used over my 30 years in the private and public sectors.

1. No matter what system you use make it your system; it can be paper, electronic, off the shelf or a formal planning product. There is no one size fits all, use what you are confident and comfortable with or it won't get used and your day will become more frustrating not less.
2. Use the touch once theory. When going through paperwork, or mail or the volume of paper that has to cross our desks daily make a habit to touch it once. Either solve it, file it, delegate it, throw it, or set it to follow up at a later date. Not constantly reviewing the same material makes the piles manageable.
3. Use timelines, a crisis is a crisis and has to be dealt with now, but those are rare. Most tasks can and should be scheduled out on a realistic, yet aggressive timeline for completion or follow-up. Remember we have 5 days in a week not everything will or should get done today.
4. Get away from your desk for at least 30 minutes each day. You may ask 'how this will help me manage my day'. The answer is simple; we all need a break go to lunch, or walk around the building, but get away from your desk for some time. The brief break allows your mind to regroup and gain some perspective about what has been accomplished so far. When you get back you can reassess and reprioritize the remainder of your day to maximize what can get done.
5. Eat the frog first. We all have things we like to do and things we don't enjoy so much. When those things that we find less enjoyable or more challenging appear on the 'to do list', take them on first when you are fresh and rested. Putting them off till the last when you are tired only makes the work more challenging; consequently, the quality of our results are not as good.

Source: ASBO Digest

Here are some leadership suggestions compiled by Clair Hertz, CFO with the Beaverton School District:

-Communication is the most important work we do.

-Staff and community members remember every interaction they have with you even if it's ten years later. While you may work with hundreds (or thousands) of staff members, there is only one business administrator. So make sure each interaction is a good one.

-Follow through. If you say you are going to do something, then do it. Figure out a system for yourself - I have to write something down for it to get done. You will know what works best for you.

-Hiring is the most important work we do. Every hire must be the best hire. If you don't find the best, repost the position and try again. When we compromise on hiring, the compromise could have a negative affect for 30 years. Are you really willing to leave this as a legacy?

-Safe environment - making the work place a safe environment through trust and respect will lead to innovation.

-It's the little things. I have 22 people in our business office. I walk through every day and do a quick check in. It may take time out of my day, and I reap the benefit of smiling staff who know I'm there if they need me.

- Go visit a classroom. Remind ourselves what teachers do for our kids every day.

Source: ASBO Digest