

Making your First Year as a CSBO a Success



Introductions

Jordi Camps, Speaker

**- Assistant Superintendent of Business Services & CFO
East Maine SD 63**



Scott Blumberg, Speaker

**- Assistant Superintendent for Business
Services/CSBO, Aptakisic-Tripp CCSD 102**



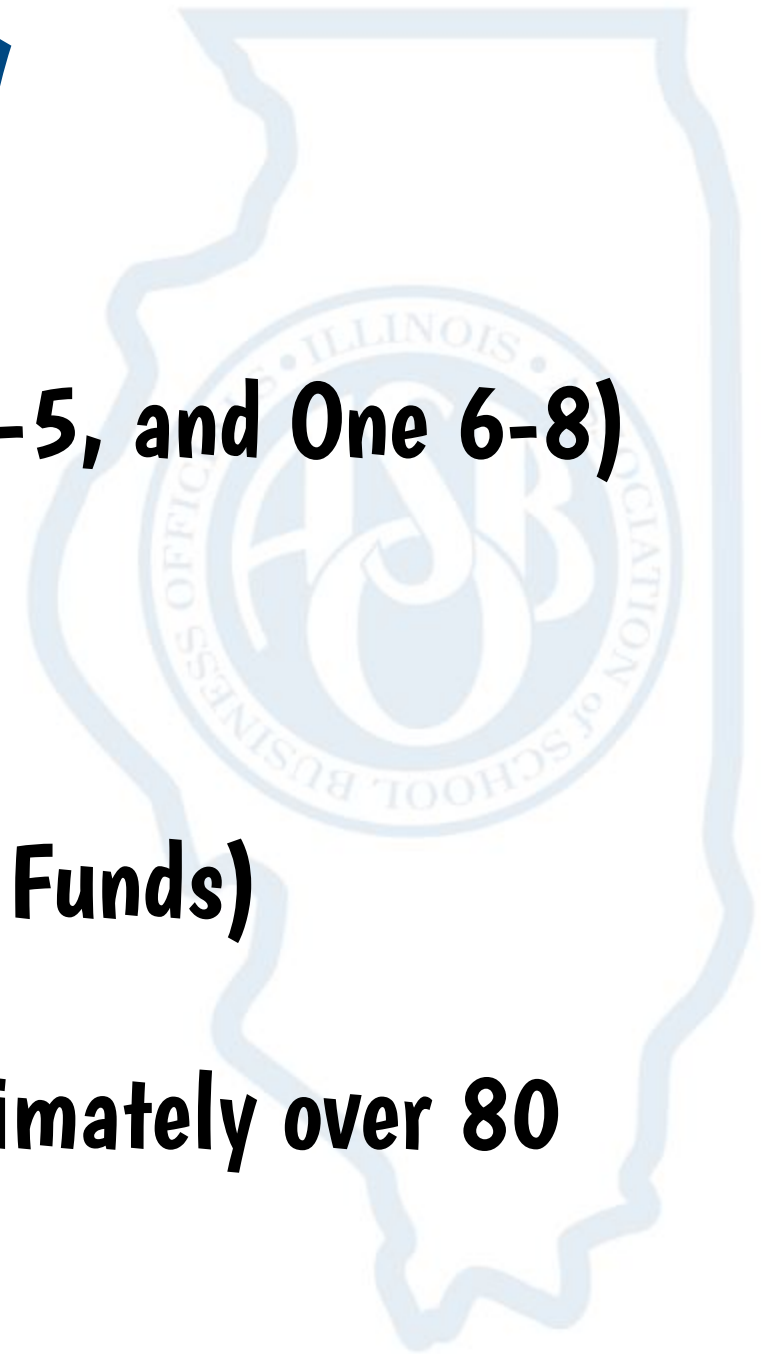
Saad Bawany, Speaker

- Senior Advisor, Data & Analytics, Frontline Education



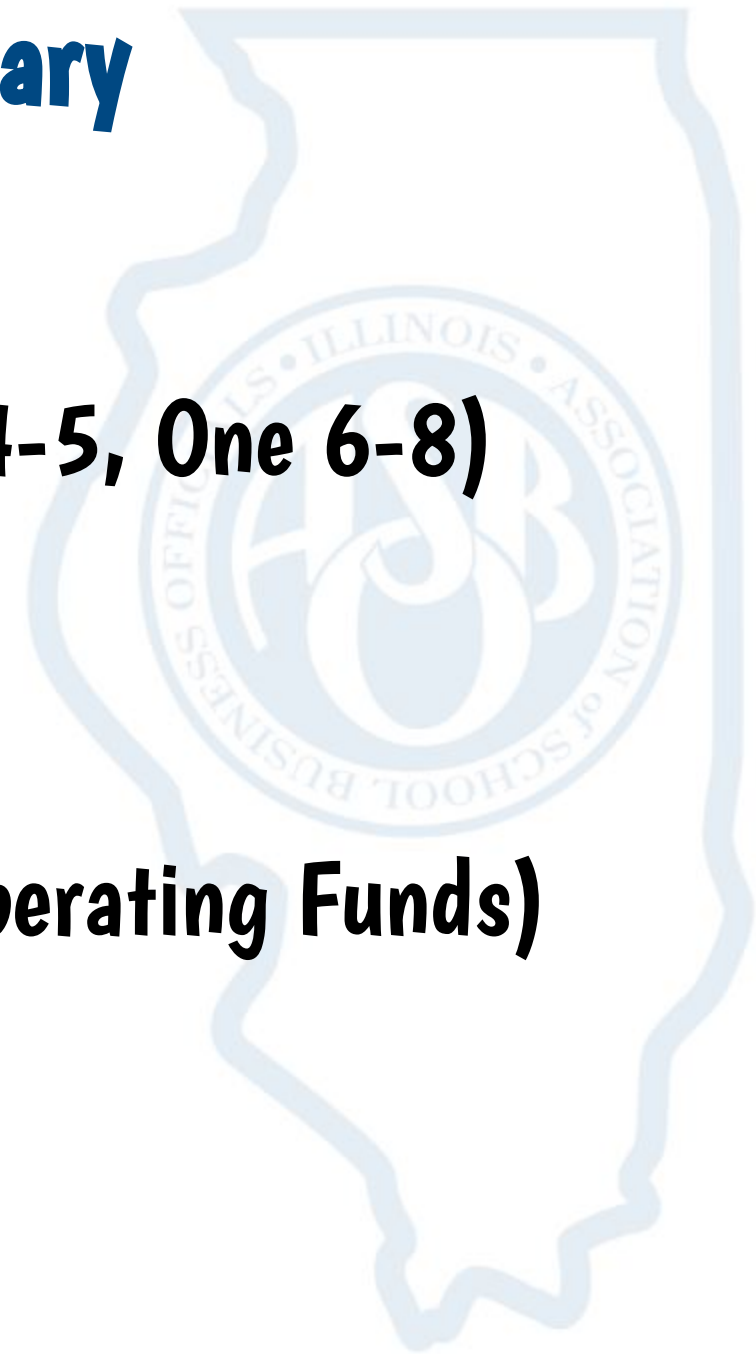
East Maine 63 - District Summary

- **# of students: 3,700**
- **# of schools: Seven Schools (One Preschool, Five K-5, and One 6-8)**
- **# of staff: 550**
- **Budget size: \$70 million (\$65 million in Operating Funds)**
- **Fun Fact: A very diverse student population. Approximately over 80 different languages spoken at students' homes.**



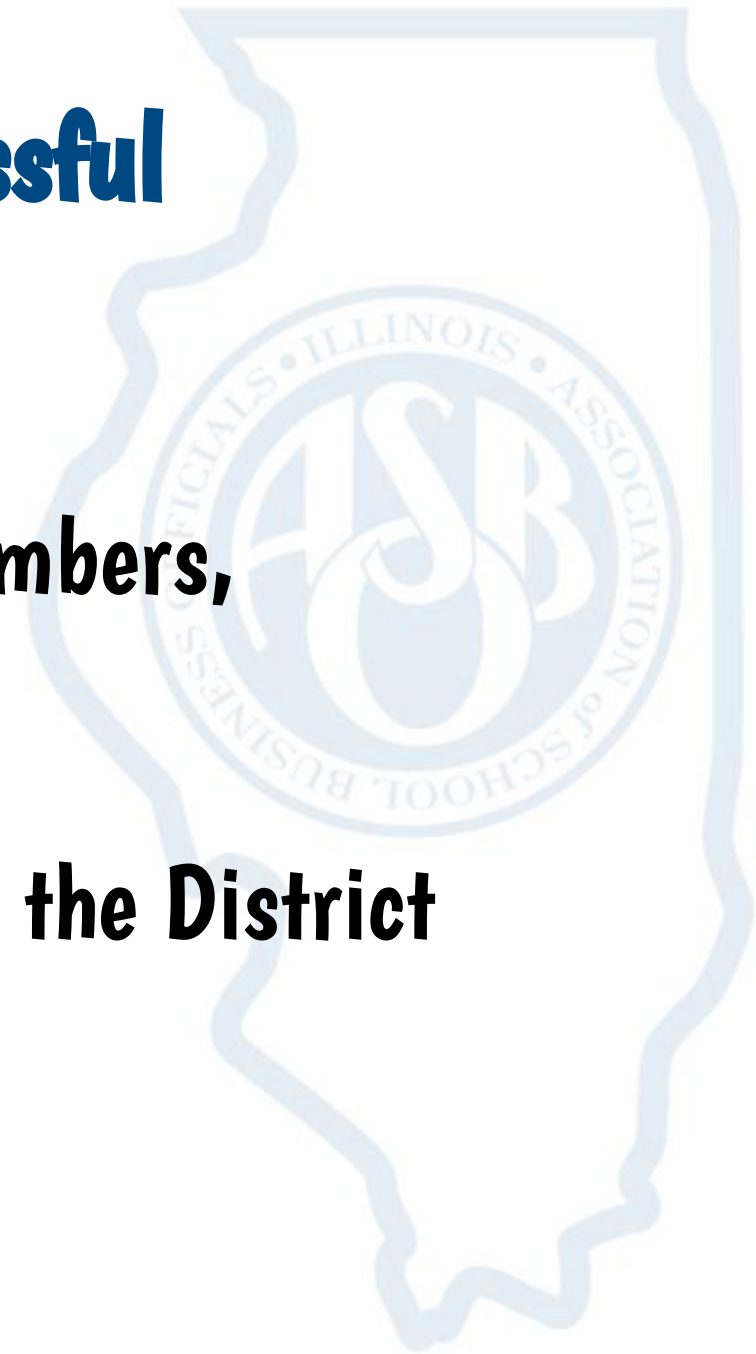
Aptakisic CCSD 102 - District Summary

- **# of students: 2,600**
- **# of schools: 4 Schools (Two K-3, One EC and 4-5, One 6-8)**
- **# of staff: 337**
- **Budget size: \$53.5 million (\$46.6 million in Operating Funds)**
- **Fun Fact: Feeds into Stevenson high school**



How do you make sure your first year is successful

- 1. Focus on the “major” business office deliverables.**
- 2. Establish trust with the Superintendent, Cabinet Members, Business Office team, and others.**
- 3. Understand your peer districts - at a high level - Tell the District story.**
- 4. Leverage professional development and networking**



Success Factor # 1

Focus on the Major Business Office Deliverables



Focusing on the "major" Business Office Deliverables

Budget	Monthly accounting
Transportation	Student Activity Funds
Food Service	Financial Reporting (ISBE, County, Federal Govt)
Employee Benefits (Health Insurance & 403b)	Grant Management
Property Tax Levy	Financial System
Treasury Functions	Parent and Community Relations
Human Resources (Business Office)	Accounts Payable
Buildings & Grounds	Payroll
Strategy (multi-year view)	Pension Systems (TRS / IMRF)
Financial Audit	Bond Issuance

Focusing on the "major" Business Office Deliverables

Budget

Monthly accounting

Transportation

Student Activity Funds

Food Service

Financial Reporting (ISBE, County, Federal Govt)

Employee Benefits (Health Insurance & 403b)

Grant Management

Property Tax Levy

Financial System

Treasury Functions

Parent and Community Relations

Human Resources (Business Office)

Accounts Payable

Buildings & Grounds

Payroll

Strategy (multi-year view)

Pension Systems (TRS / IMRF)

Financial Audit

Bond Issuance

"Major" Business Office Deliverables: The Budget

- **Review the presentation that was given to the Board**
- **Budget Expectations from the Board: Balanced Budget? / Using Reserves?**
- **Understand all revenue lines**
 - **Property Tax**
 - **CPPRT**
 - **Student Fees**
 - **State Revenues**
 - **Federal Revenues**



"Major" Business Office Items: The Budget

- **Understand all expense lines**
 - **Payroll: Salaries, Timesheets, Stipends**
 - **Benefits: Insurance Premiums**
 - **Central Department Budgets**
 - **New initiatives?**
 - **Recurring expenses vs. one-time expenses**
 - **Rates of increase of certain expenses**



"Major" Business Office Items: The Budget

- **Understand all Transfers**
 - **Understand what funds are impacted**
 - **Issuing Bonds**
 - **Lease on copiers**
 - **Transfer of interest earned to the Educational Fund**
- **How do you know your budget is right?**
 - **Compare all revenue and expense lines:**
 - **Actuals vs. budget**
 - **Budget vs. budget**



"Major" Business Office Items: The Property Tax Levy

- **Property Taxes will likely be the largest source of revenue. It's critical to get it right.**
- **District philosophy on the Levy**
 - **Community expectations**
 - **Does the board expect to levy the maximum allowed by law**
 - **Make your recommendation, but proceed accordingly.**

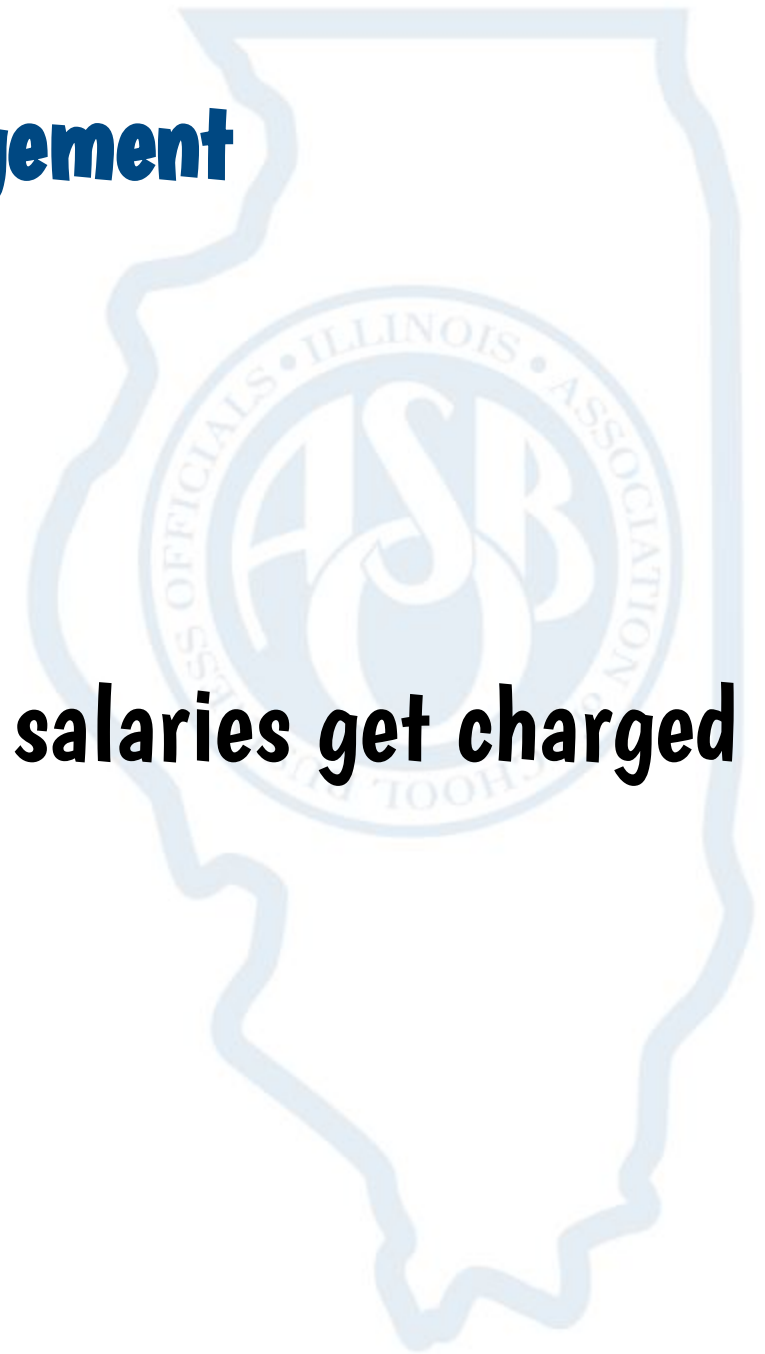
"Major" Business Office Items: The Property Tax Levy

- **New Property**
 - **Township Assessor**
- **Tax Increment Financing (TIF) areas**
 - **Do you have any?**
 - **What are they and when do they expire?**



"Major" Business Office Items: Grant Management

- **What state and federal grants do you have?**
- **Are you funding certain positions with the grant?**
 - **Is your payroll system properly set up so those salaries get charged to the grant**



"Major" Business Office Items: Grant Management

- **Quarterly expenditure reports**
 - **When are they due?**
 - **Amendments?**
- **Do you report the state of each grant to the grant owners?**
 - **It is recommended that you do.**



Success Factor #2

Establishing Trust



Establishing Trust...

- **With who?**
 - **Superintendent, Board, your staff, cabinet, principals**
- **Learn the financial philosophy of the District**
- **Determine the political untouchables**
- **Be proactive about your annual evaluation**



Establishing Trust with Superintendent and Board

- What is the philosophy / mindset of the superintendent
 - What is the approach to the district finances
 - Building fund balance
 - Utilizing fund balance
 - What are the key initiatives that need to be prioritized for funding



Establishing Trust with Superintendent and Board

- **What is the philosophy / mindset of the superintendent**
 - **How involved does the Superintendent want to be in the finances and other operational items under the CSBO's responsibility.**
 - **What is the Superintendent's role in financial presentations to the Board**
 - **What are the political untouchables**



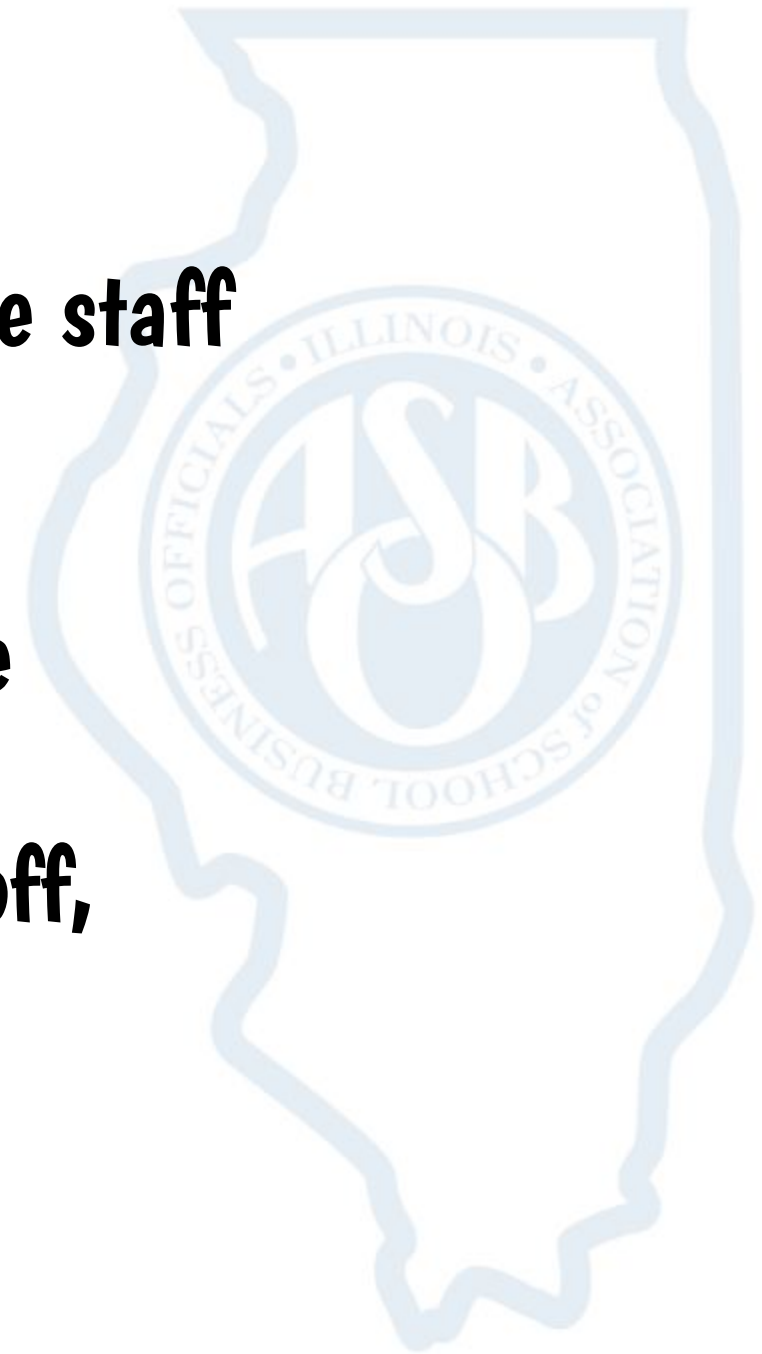
Establishing Trust with Cabinet and Principals

- **Within the first 60 days (probably less), you should have one-on-one meetings with them.**
 - **Review their budgets**
 - **What are the significant expenditures**
 - **What is their expectation of you?**
 - **Set up follow-up meeting**
 - **Do what you say you are going to do**



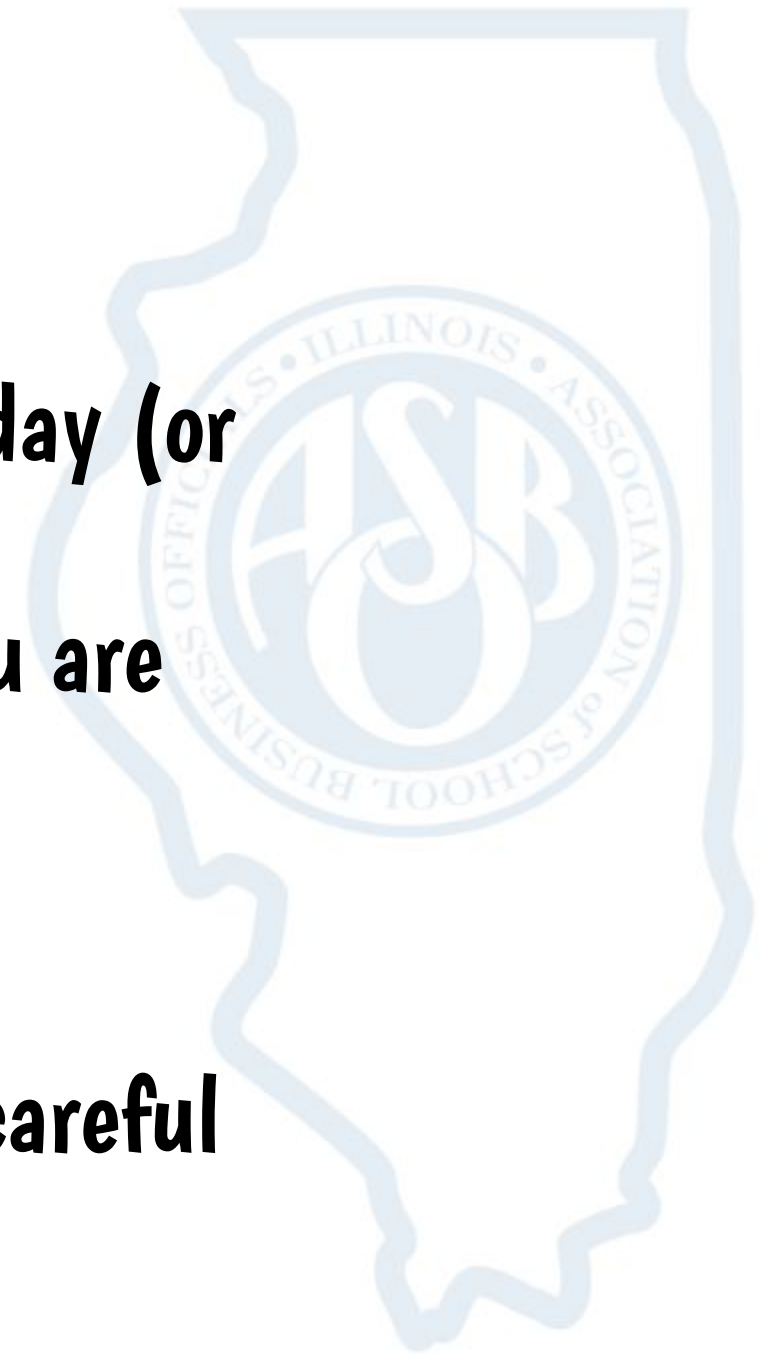
Establishing Trust with your Staff

- **Try to understand the state of the business office staff before you meet them**
 - **Capabilities**
 - **What are the strengths and weaknesses of the department**
 - **What are the "rules" around approving time off, taking sick days.**



Establishing Trust with your Staff

- **When you meet your staff**
 - **Have a group meeting probably on your first day (or second)**
 - **Tell them about you. Make sure they know you are excited about this opportunity.**
 - **Set up one-on-one meetings**
- **Staff meetings: These can be helpful....but be careful not to waste anybody's time.**



Establishing Trust - Your Annual Evaluation

- **Be Proactive**
 - **After the first 90-day set up a checkpoint with your Superintendent**
 - **Set up subsequent check points as needed**
 - **Set up a realistic goal for the renewal of your contract**
 - **One-year vs. multi-year contract renewal**



Success Factor #3

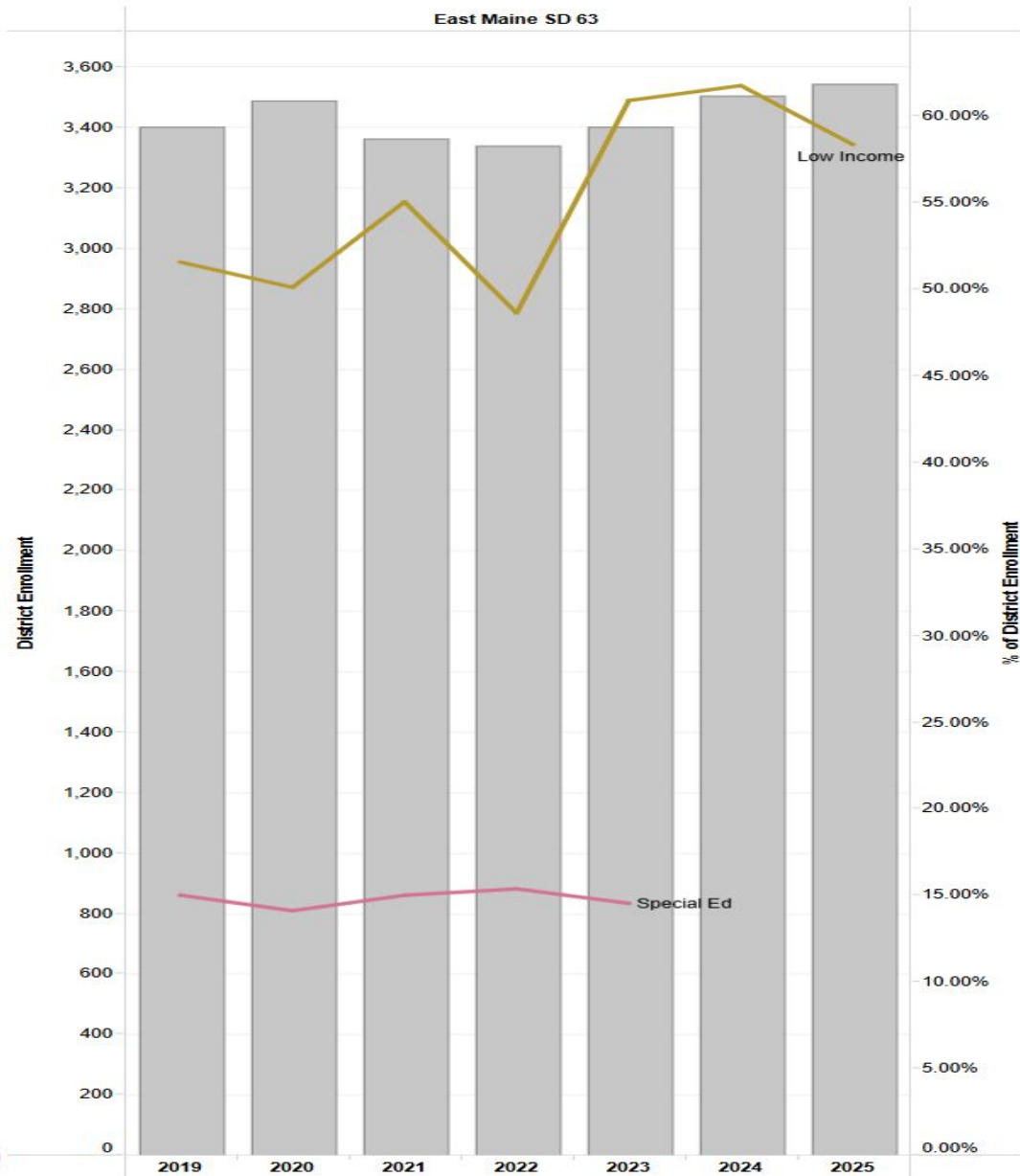
Be Able to Tell the Story of Your District - At a High Level



Enrollment Trends

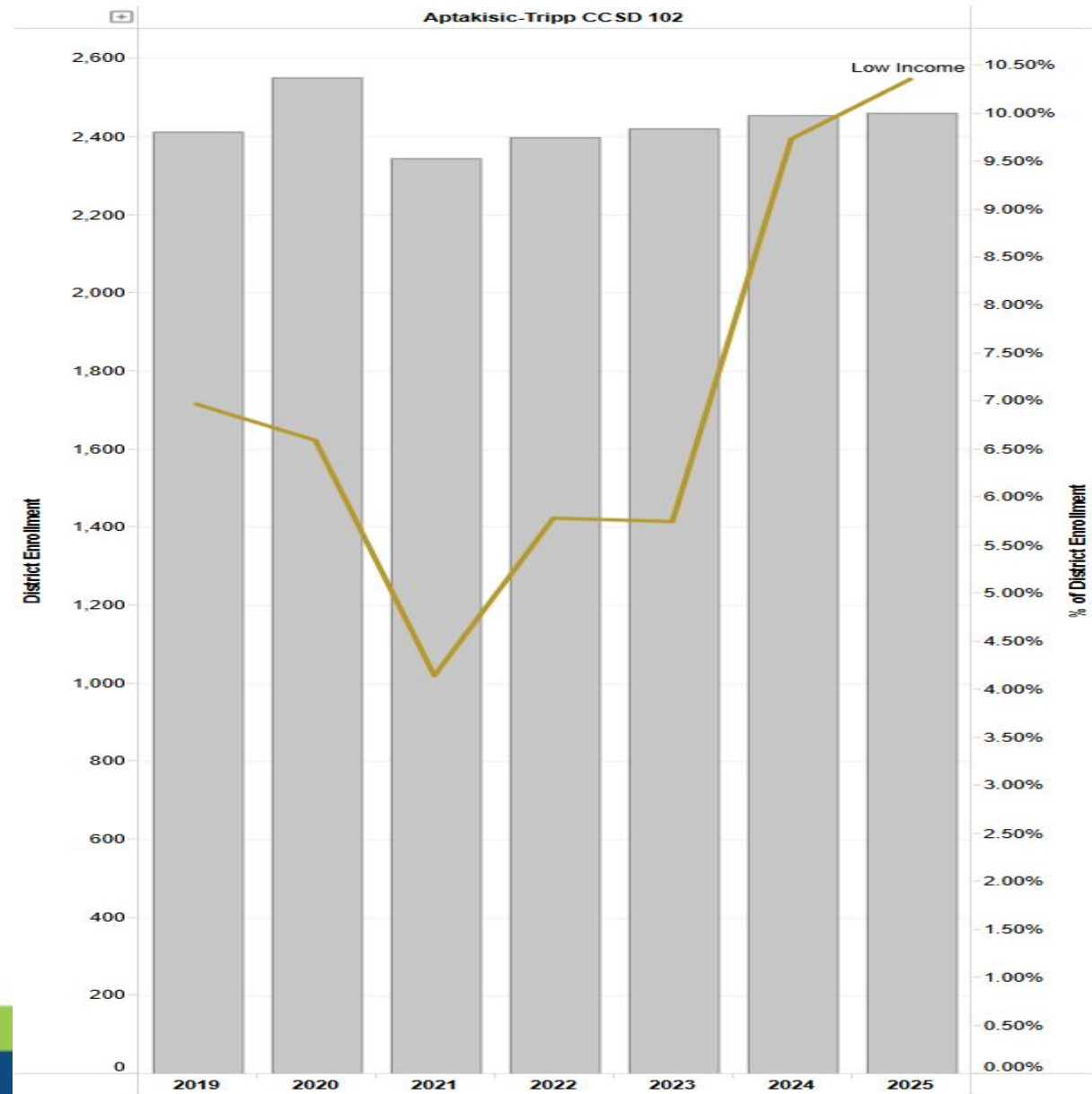
Enrollment Breakdown (District Level)

Source: ISBE Fall Housing Enrollment Data

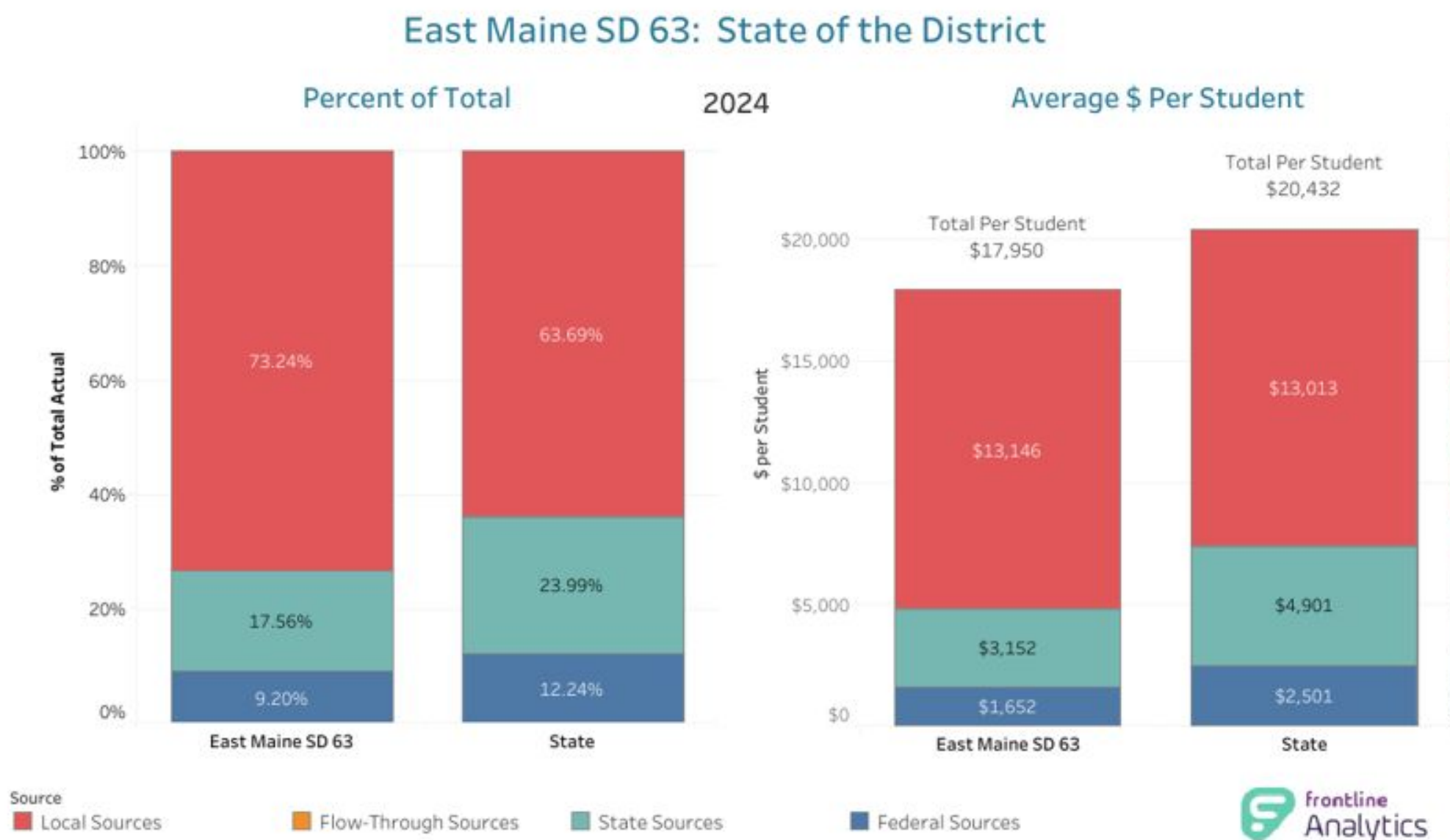


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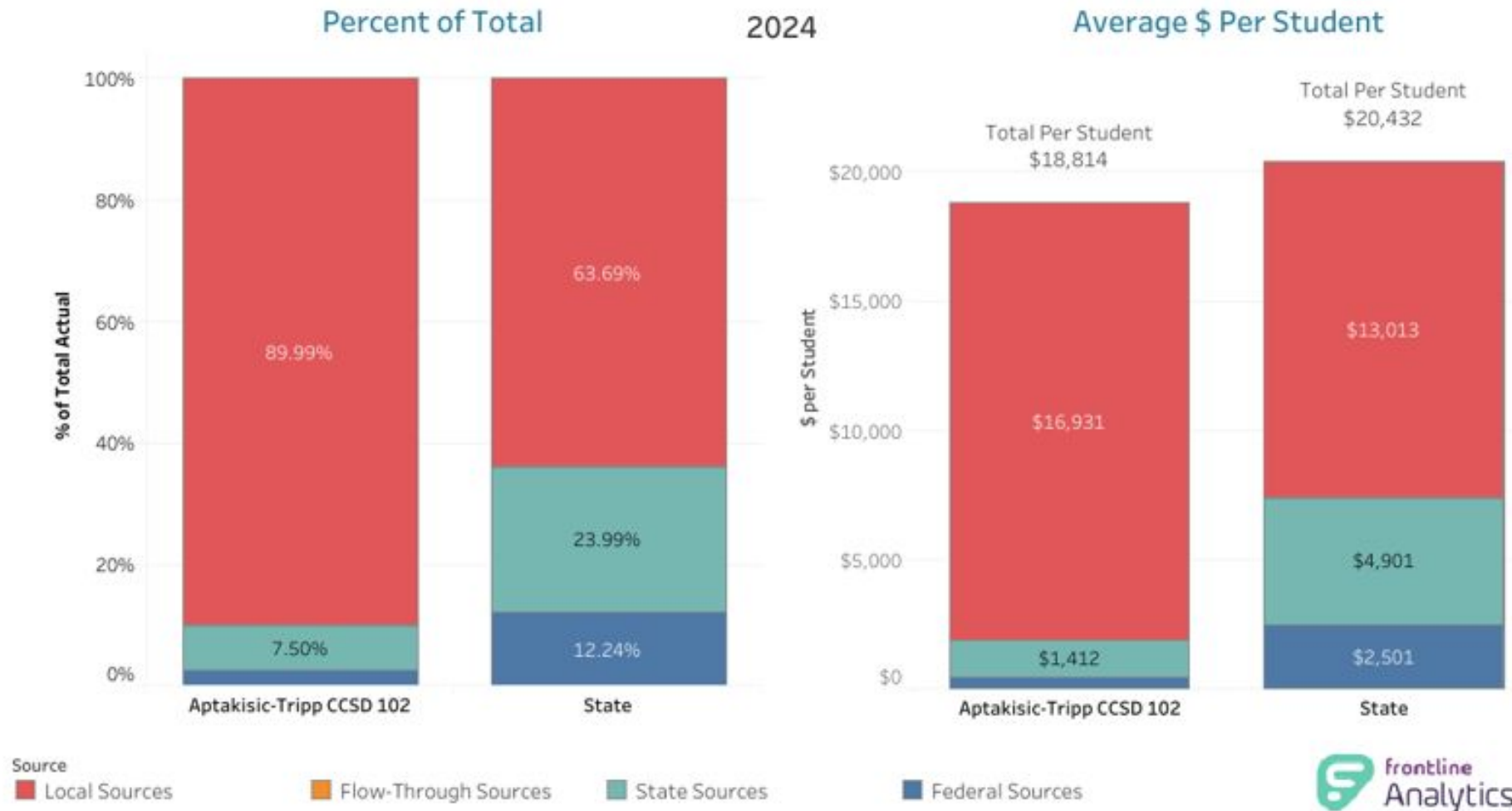


East Maine 63 - Revenue Breakdown



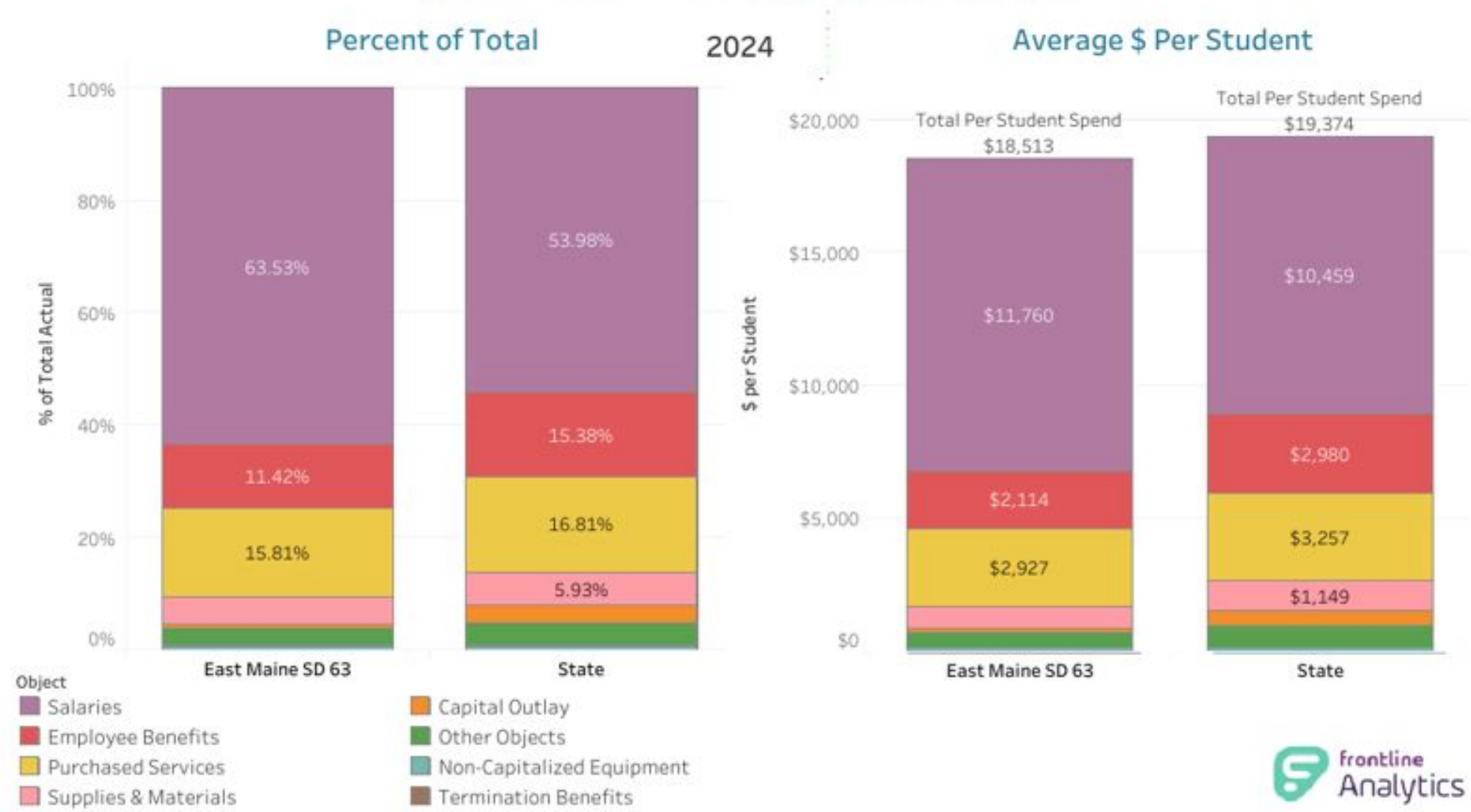
Aptakistic CCSD 102 - Revenue Breakdown

Aptakistic-Tripp CCSD 102: State of the District



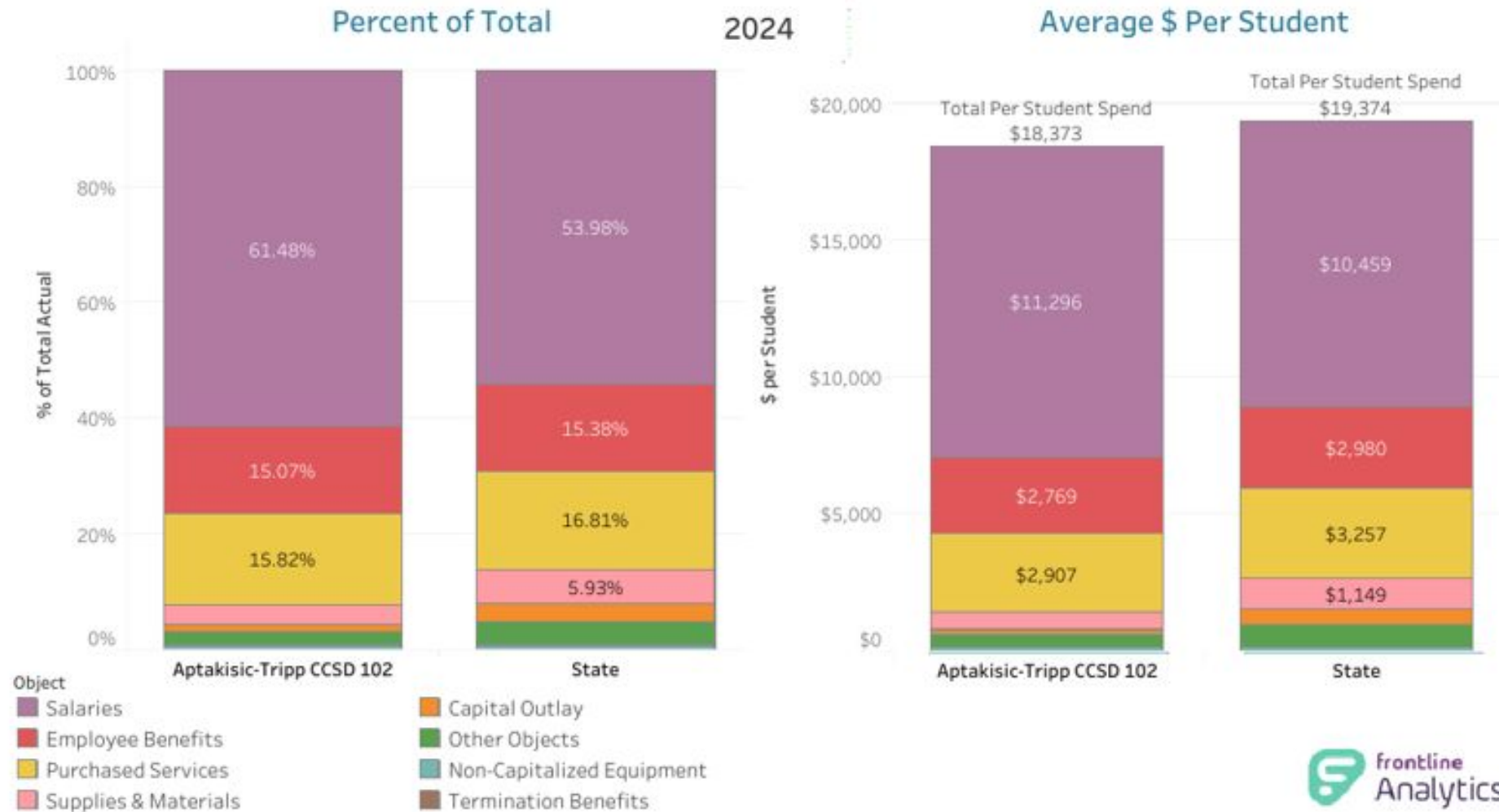
East Maine 63 - Expense Breakdown

East Maine SD 63: State of the District

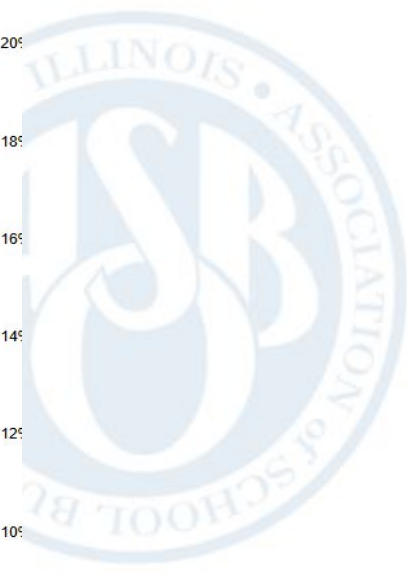
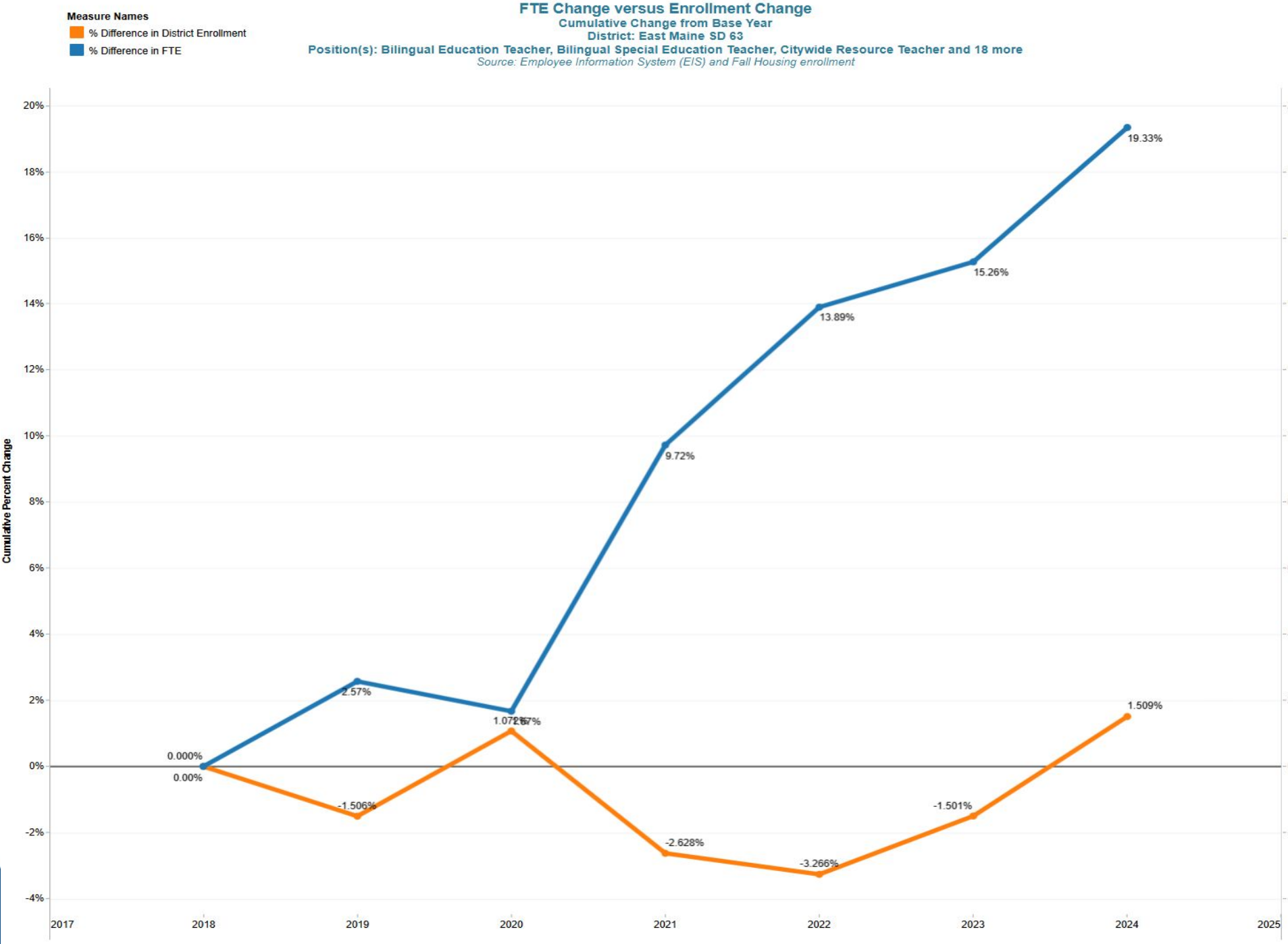


Aptakisis 102 - Expense Breakdown

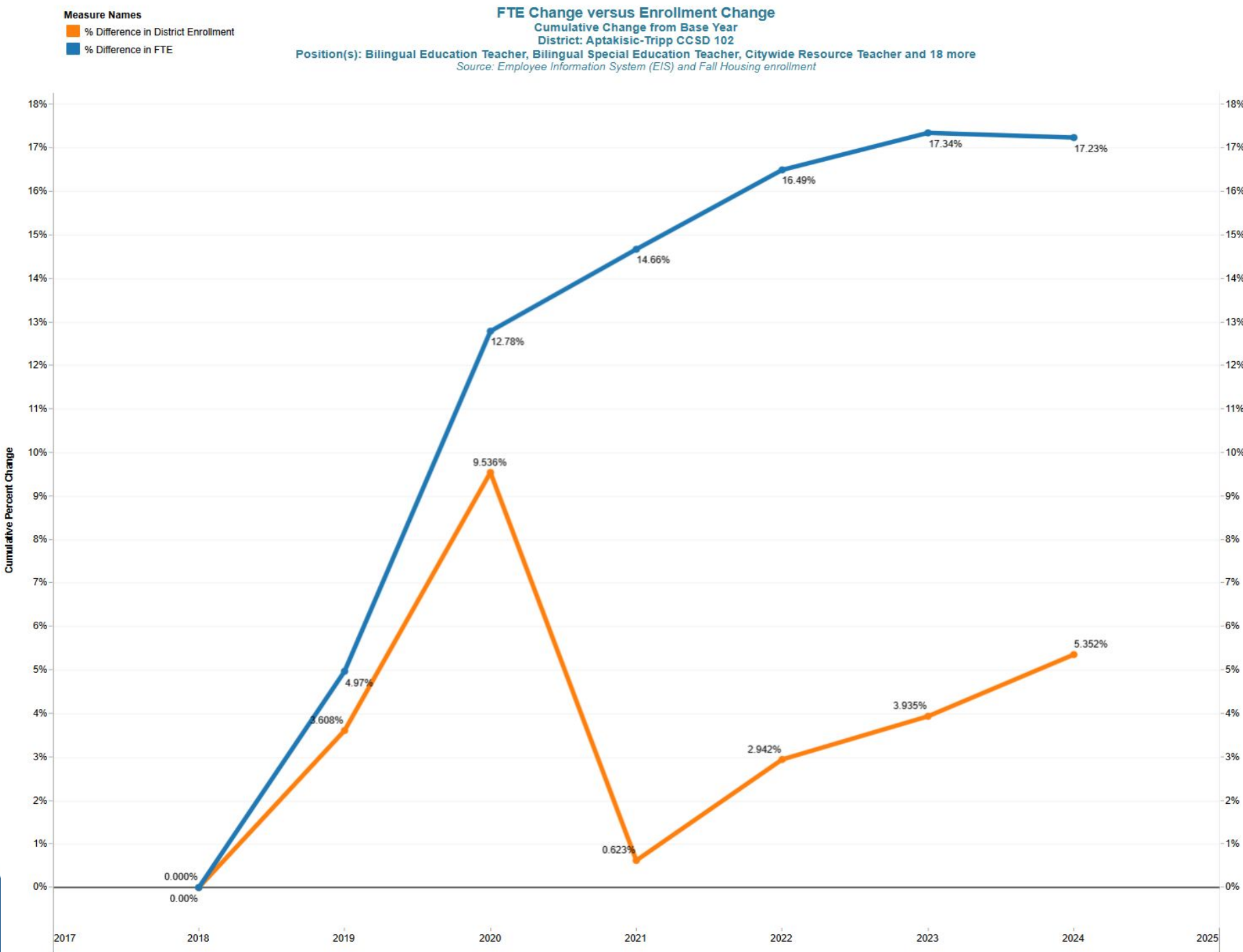
Aptakisis-Tripp CCSD 102: State of the District



East Maine 63 - FTE vs Enrollment Trend



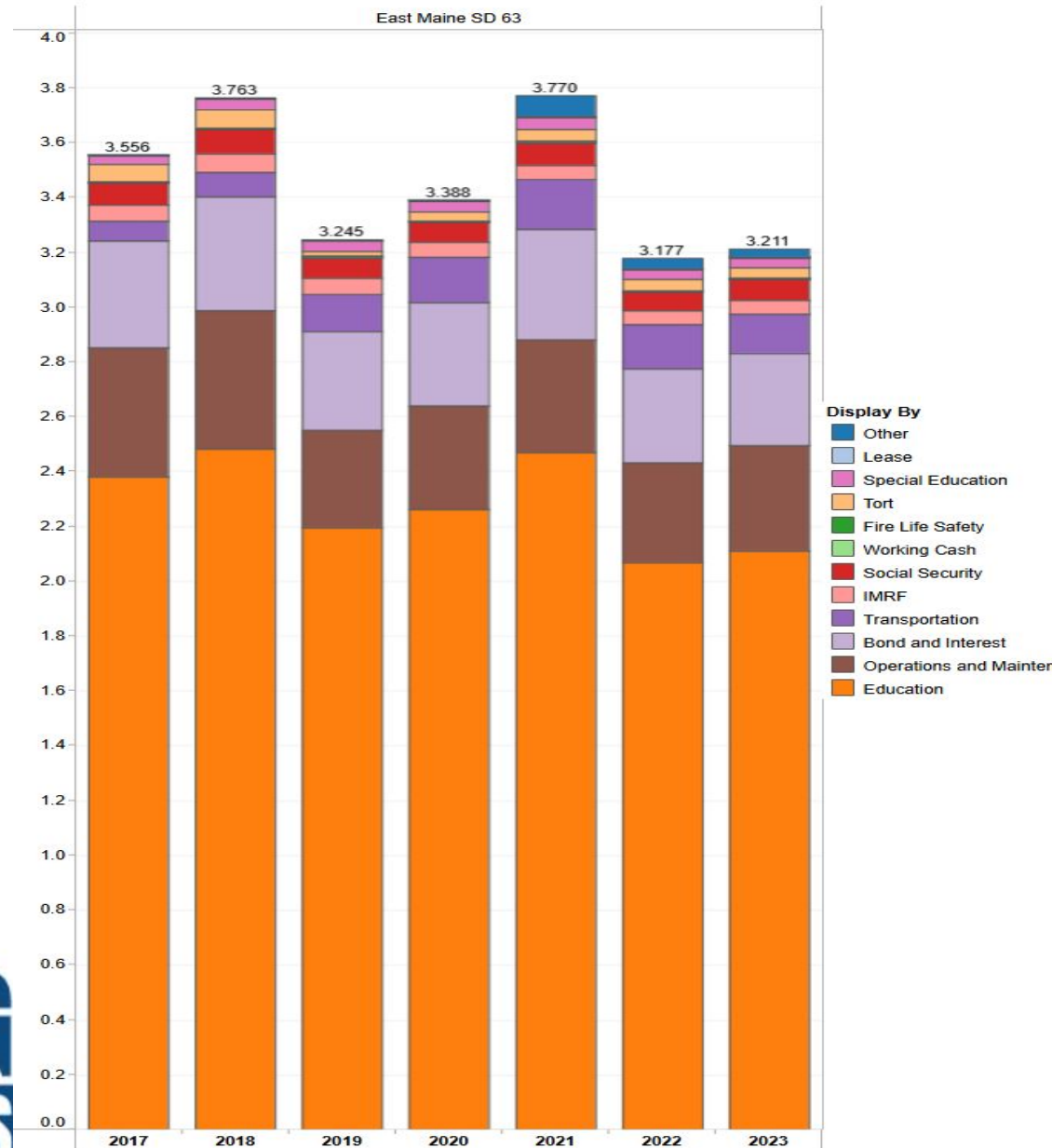
Aptakistic 102 - FTE vs Enrollment Trend



Tax Rates

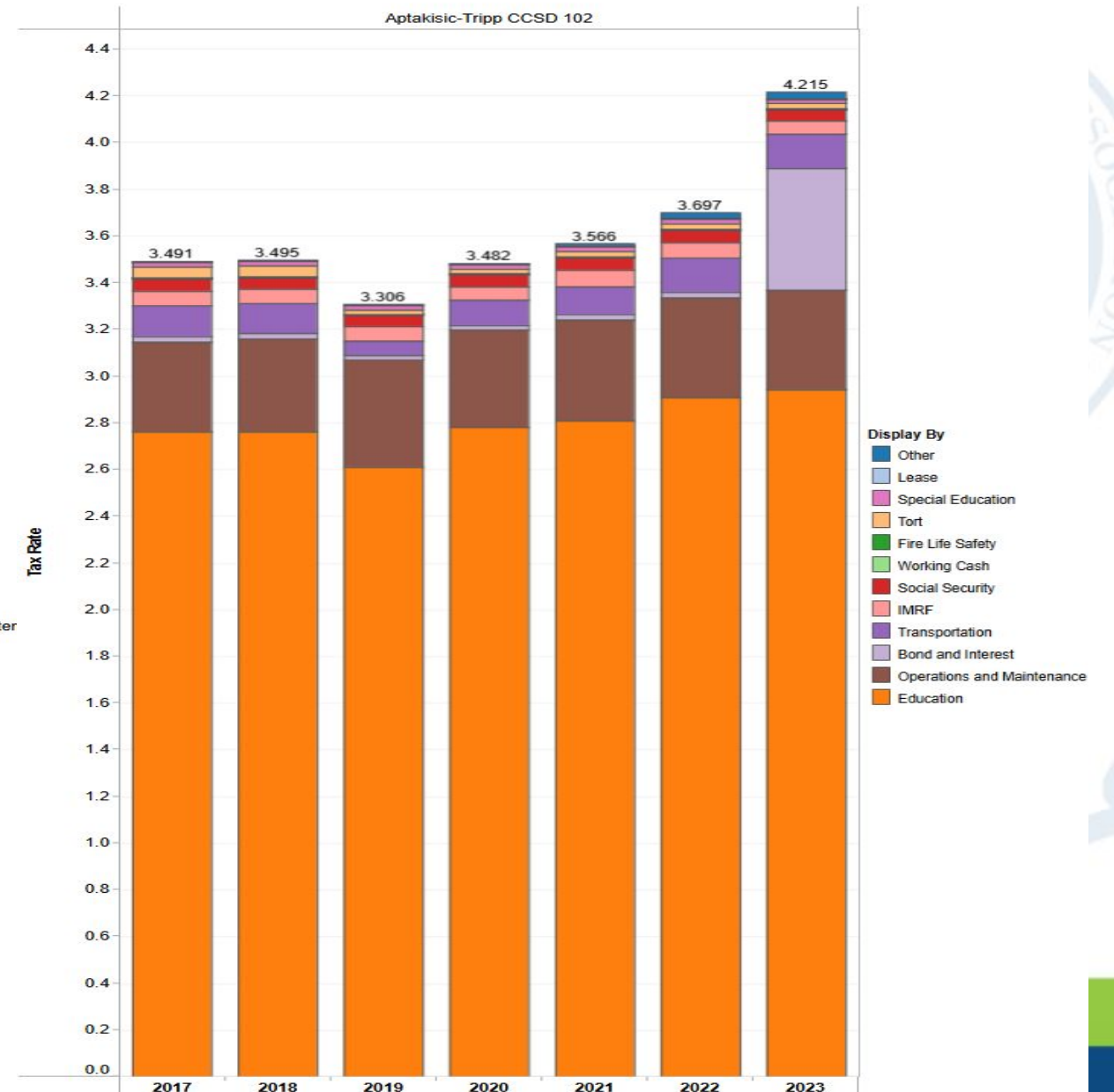
Tax Rates

Source: ISBE General State Aid data



Tax Rates

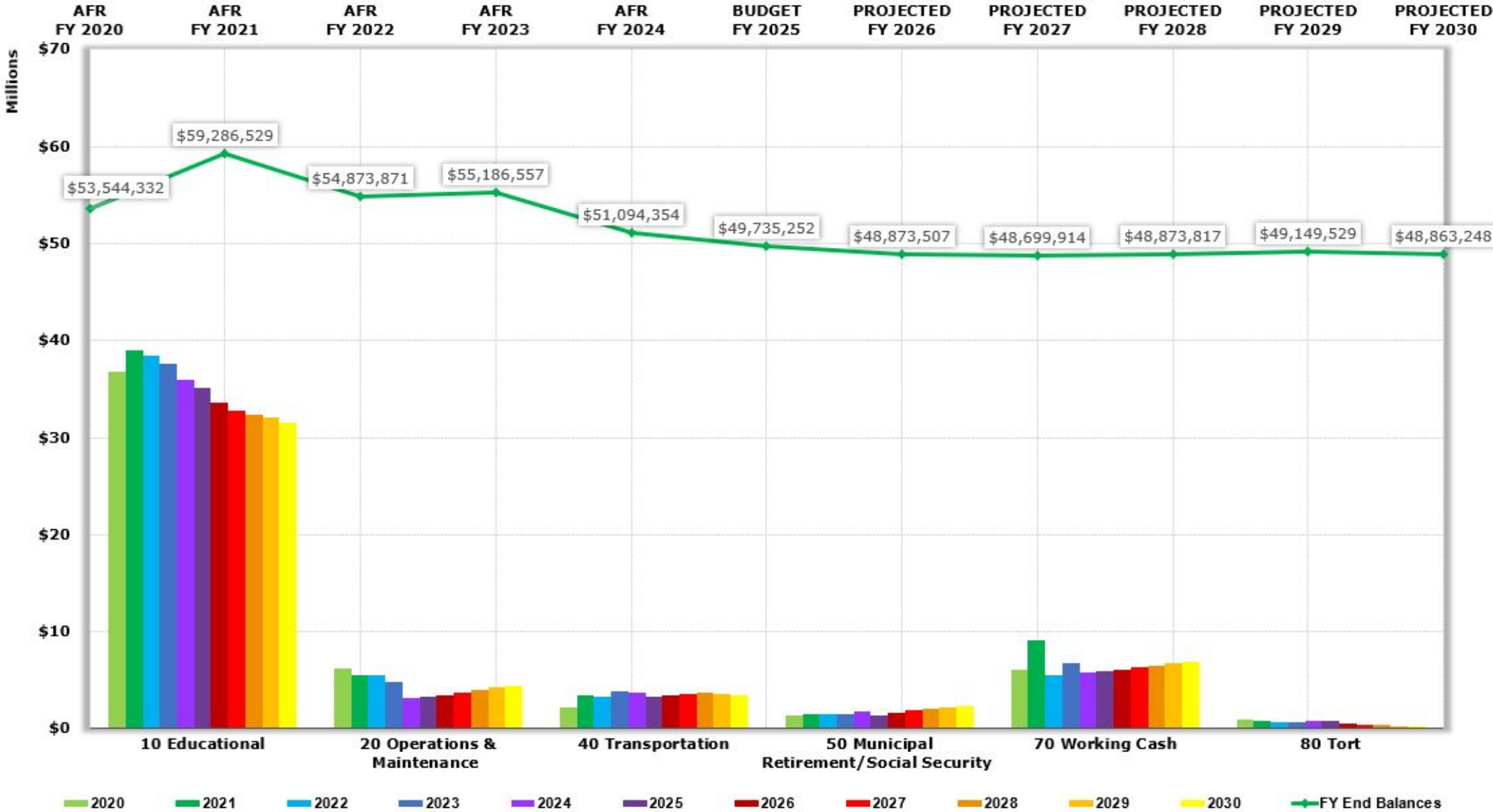
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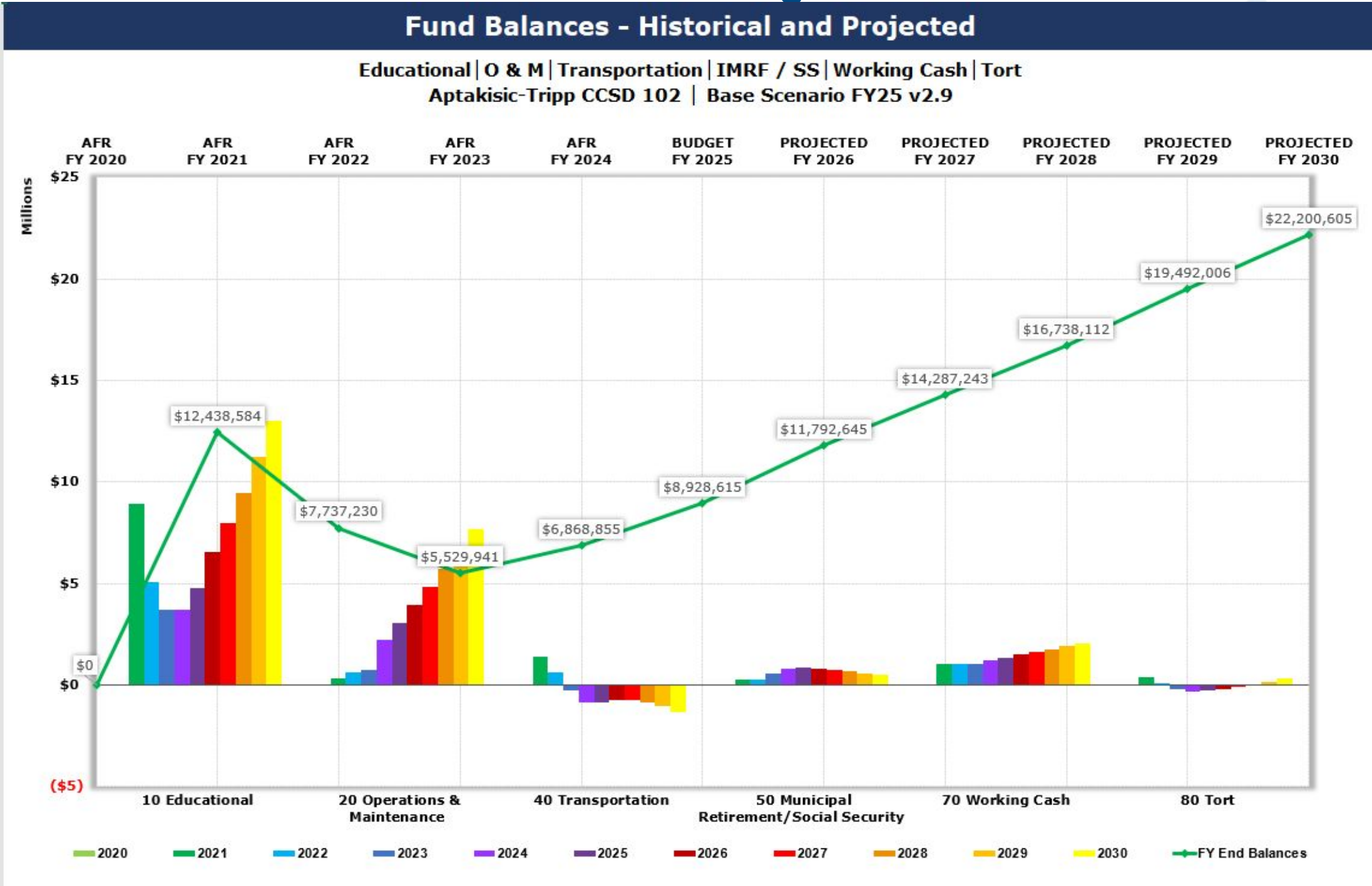
Financial Historical & Projected Outlook

Fund Balances - Historical and Projected

Educational | O & M | Transportation | IMRF / SS | Working Cash | Tort
East Maine SD 63 | Base Scenario 6.0 MH AA - Reduction in FTE in FY27

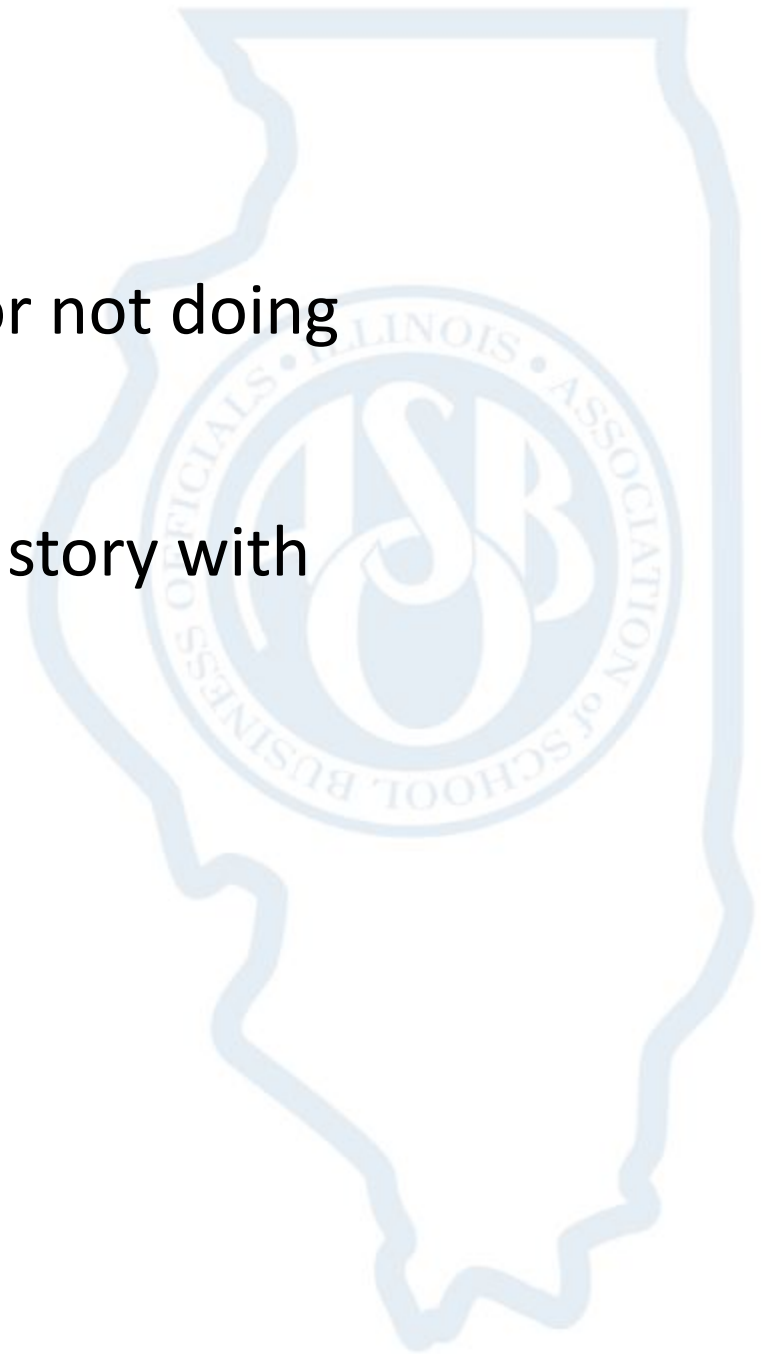


Financial Historical & Projected Outlook



Why do I need a Peer Group?

- How do you know how well your district is doing or not doing without comparing to other districts?
- Create goals and metrics
- Knowing this and the why behind it is part of your story with the Board and community
- Salary negotiations
- Salary comparisons to attract and retain talent



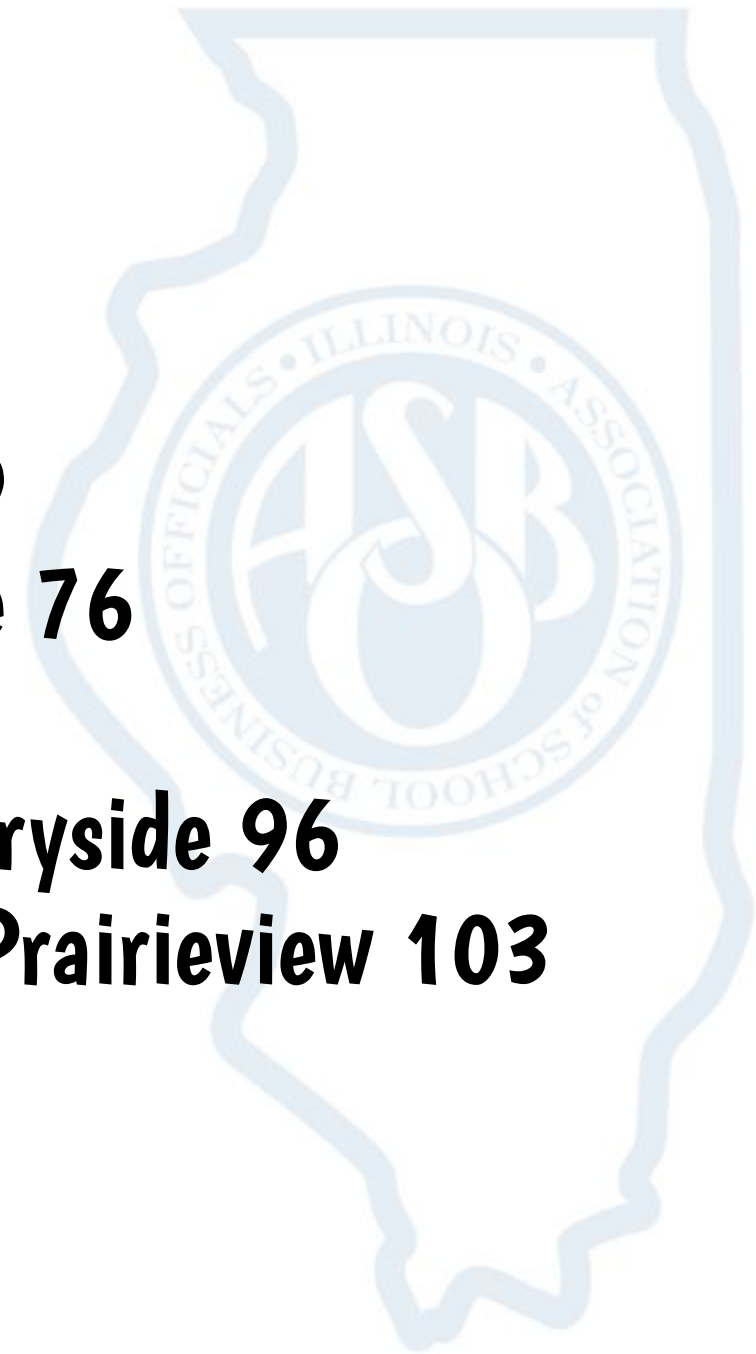
Peer Groups

East Maine 63

- **Berkeley 87**
- **CCSD 62**
- **Franklin Park 84**
- **Skokie 69**
- **Wheeling 21**

Aptakisic 102

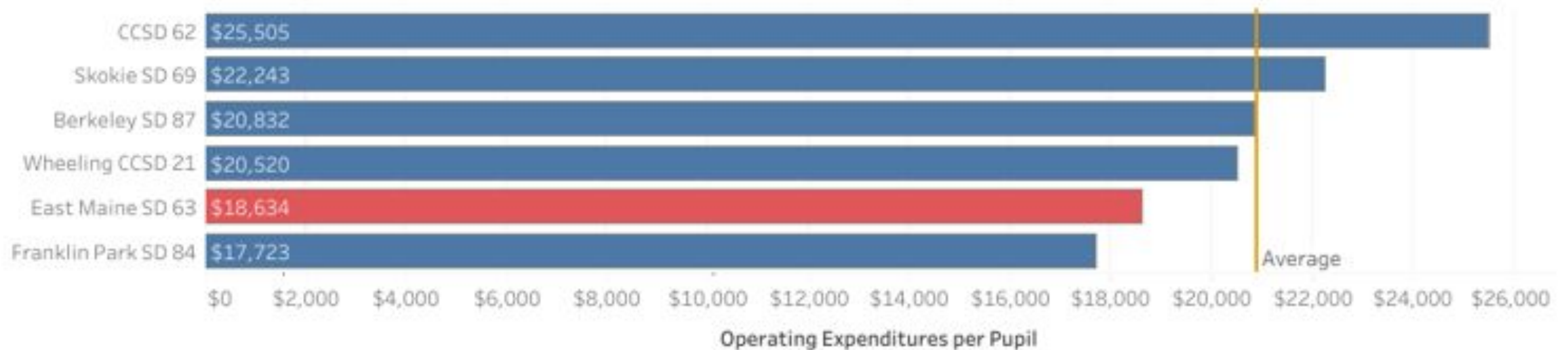
- **Deerfield 109**
- **Diamond Lake 76**
- **Hawthorn 73**
- **Kildeer Countryside 96**
- **Lincolnshire-Prairieview 103**
- **Wheeling 21**



Operating Exp per Pupil

East Maine SD 63: State of the District

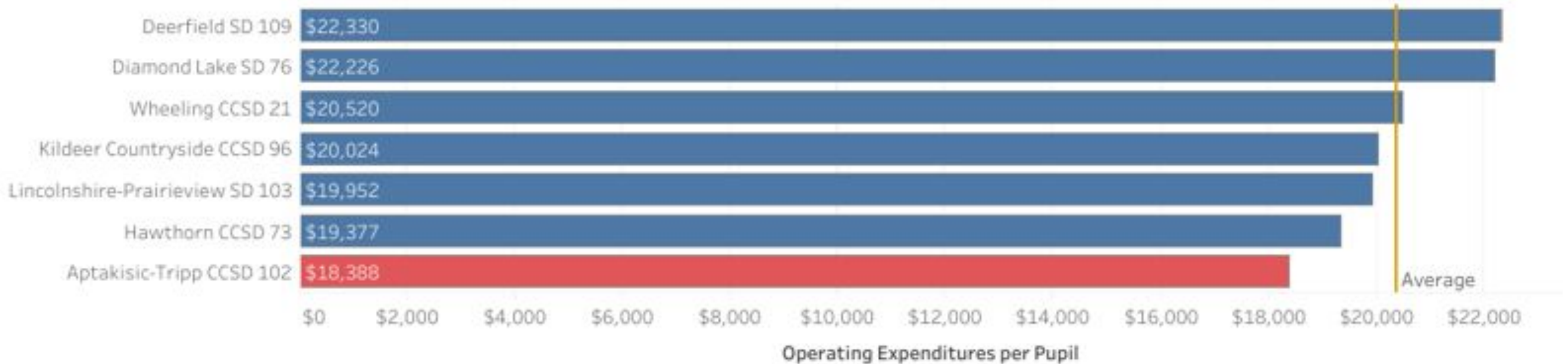
Operating Expenditures per Pupil (OEPP) is a reflection of available resources and student needs. The chart below shows the district's OEPP for 2024 compared to its peers.



Operating Exp per Pupil

Aptakisis-Tripp CCSD 102: State of the District

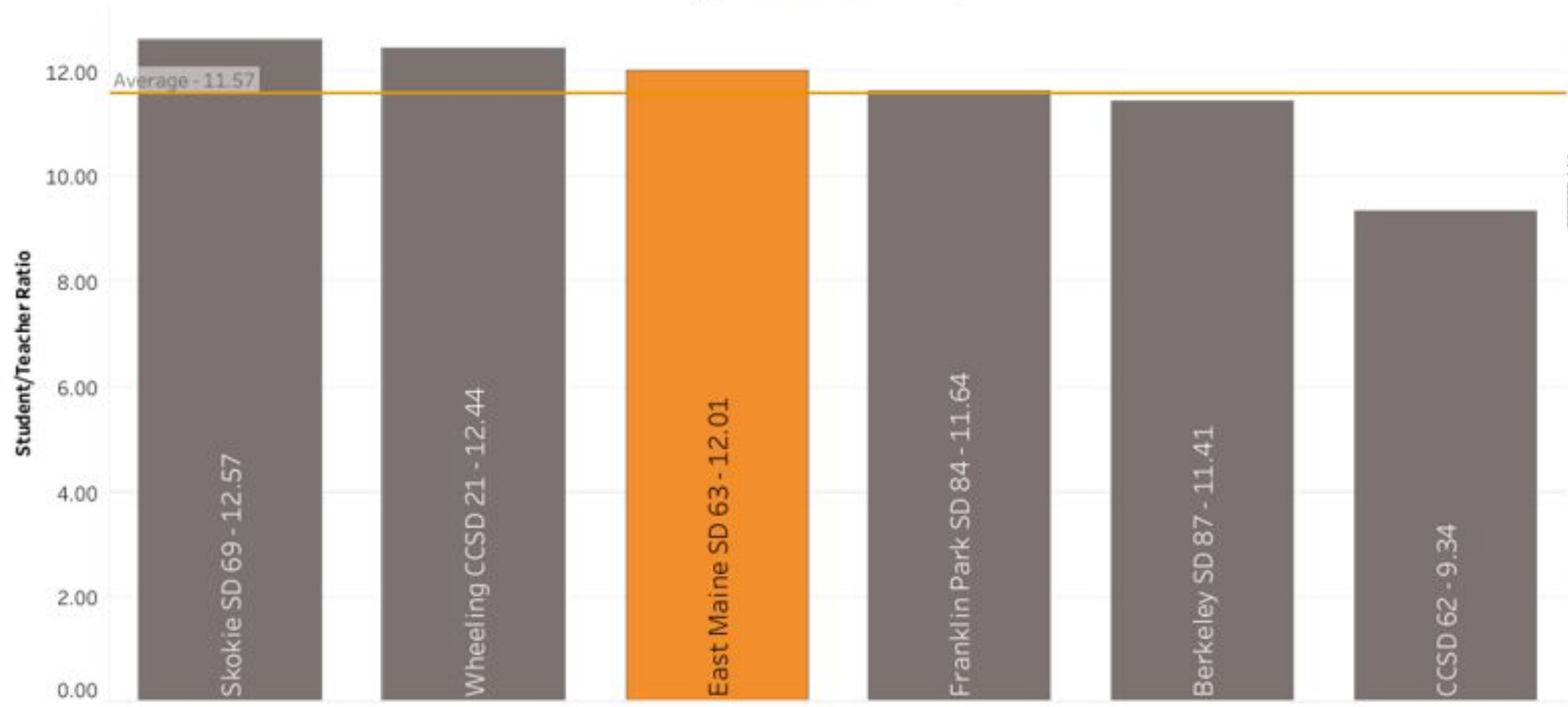
Operating Expenditures per Pupil (OEPP) is a reflection of available resources and student needs. The chart below shows the district's OEPP for 2024 compared to its peers.



Student to Teacher Ratio

East Maine SD 63: State of the District

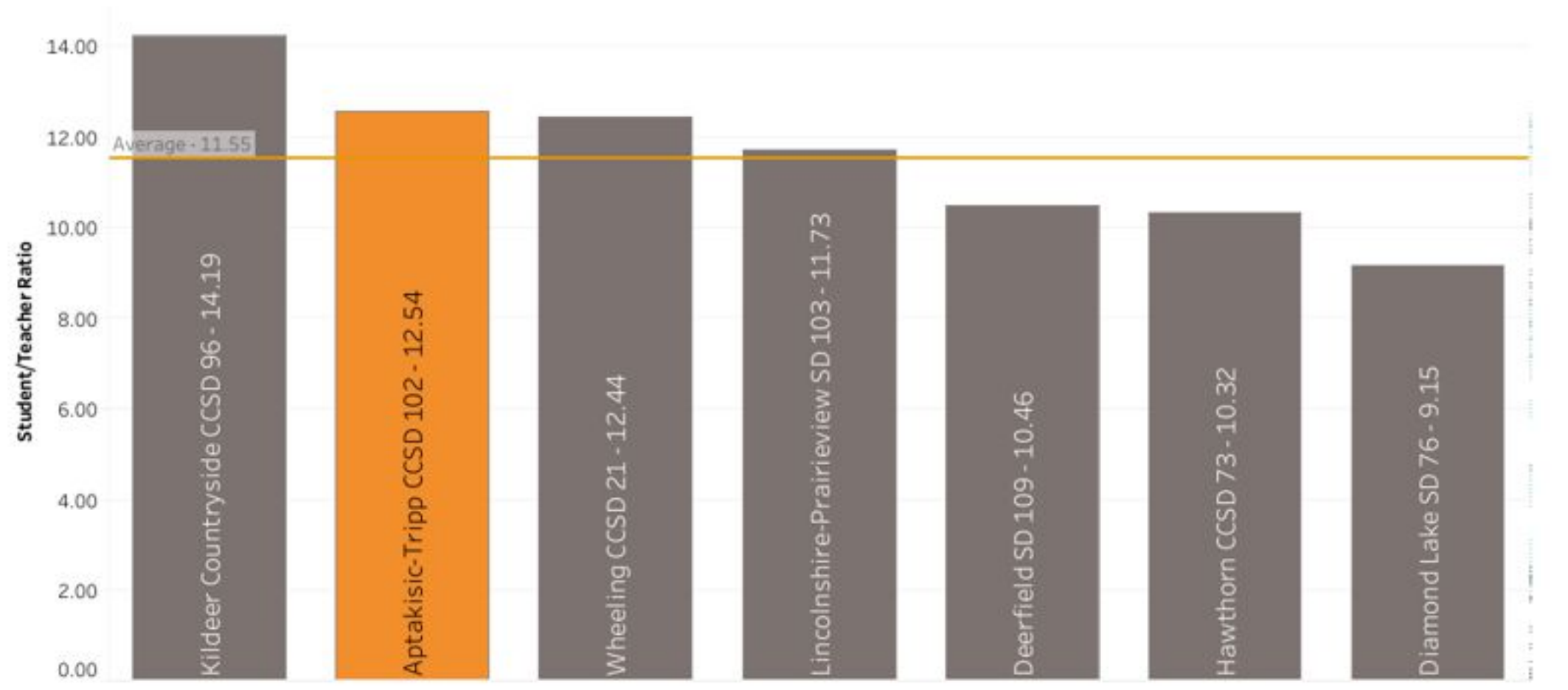
2024 - Student per Teacher FTE Comparison



Student to Teacher Ratio

Aptakisis-Tripp CCSD 102: State of the District

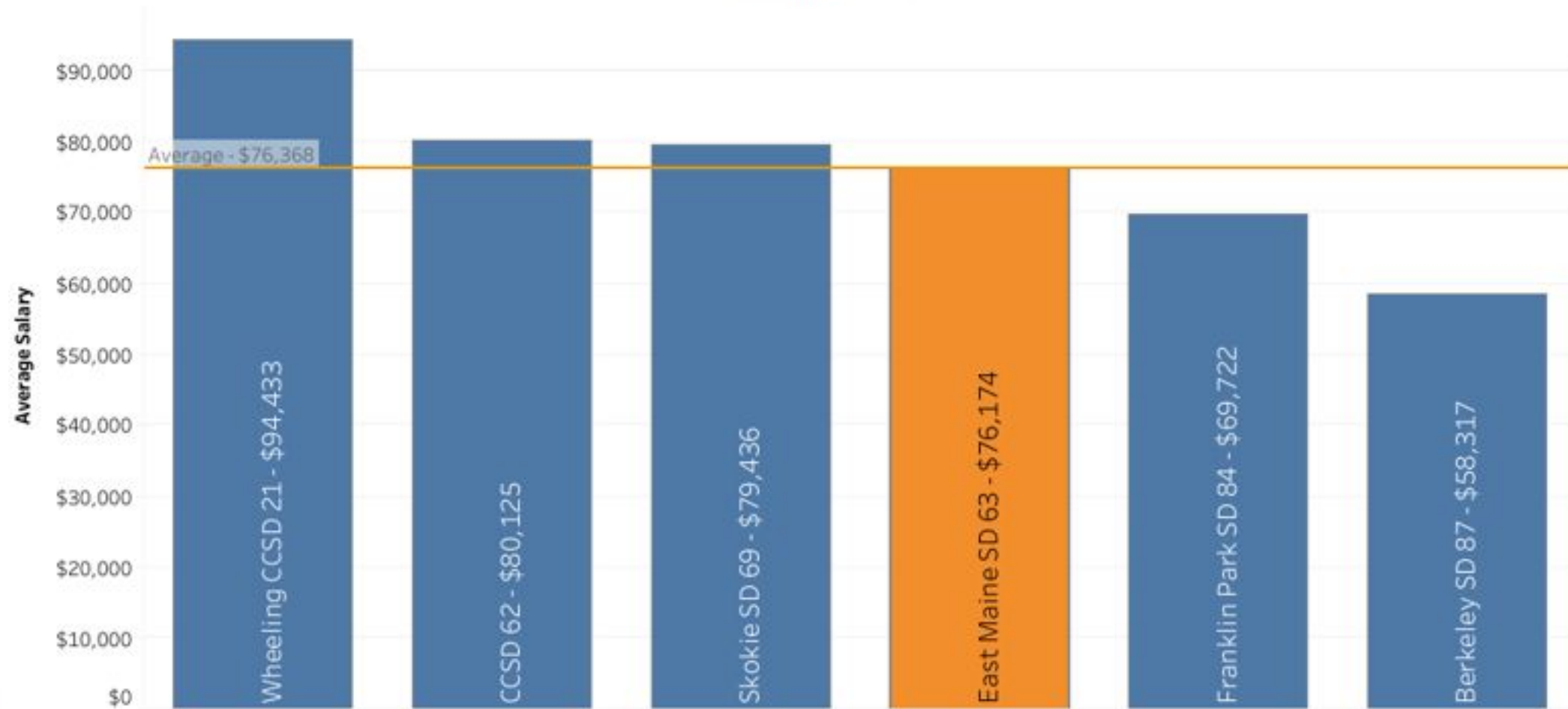
2024 - Student per Teacher FTE Comparison



Teacher Salary Comparison

East Maine SD 63: State of the District

2024 - Teacher Salary



Teacher Salary Comparison

Aptakisic-Tripp CCSD 102: State of the District

2024 - Teacher Salary



Success Factor #4

Networking and Professional Development



Build your Network and Professional Development

- How can you leverage your colleagues in your area?
- Participate in IASBO:
 - Regional Group meetings
 - Peer to Peer
 - PDCs
 - Present or Moderate a session for IASBO PD
 - Networking
- Other connections (Service Associates)



Build your Network and Professional Development

- **Attend PD sessions:**
 - **IASBO Annual conference**
 - **ISDLAF seminars**
 - **Leadership Day**
 - **Lunch & Learn sessions**



Additional Resources from IASBO
Career Resources on the IASBO Web Page



Presenters:

PANELISTS INFO:

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Questions and Answers

We thank you for your time!



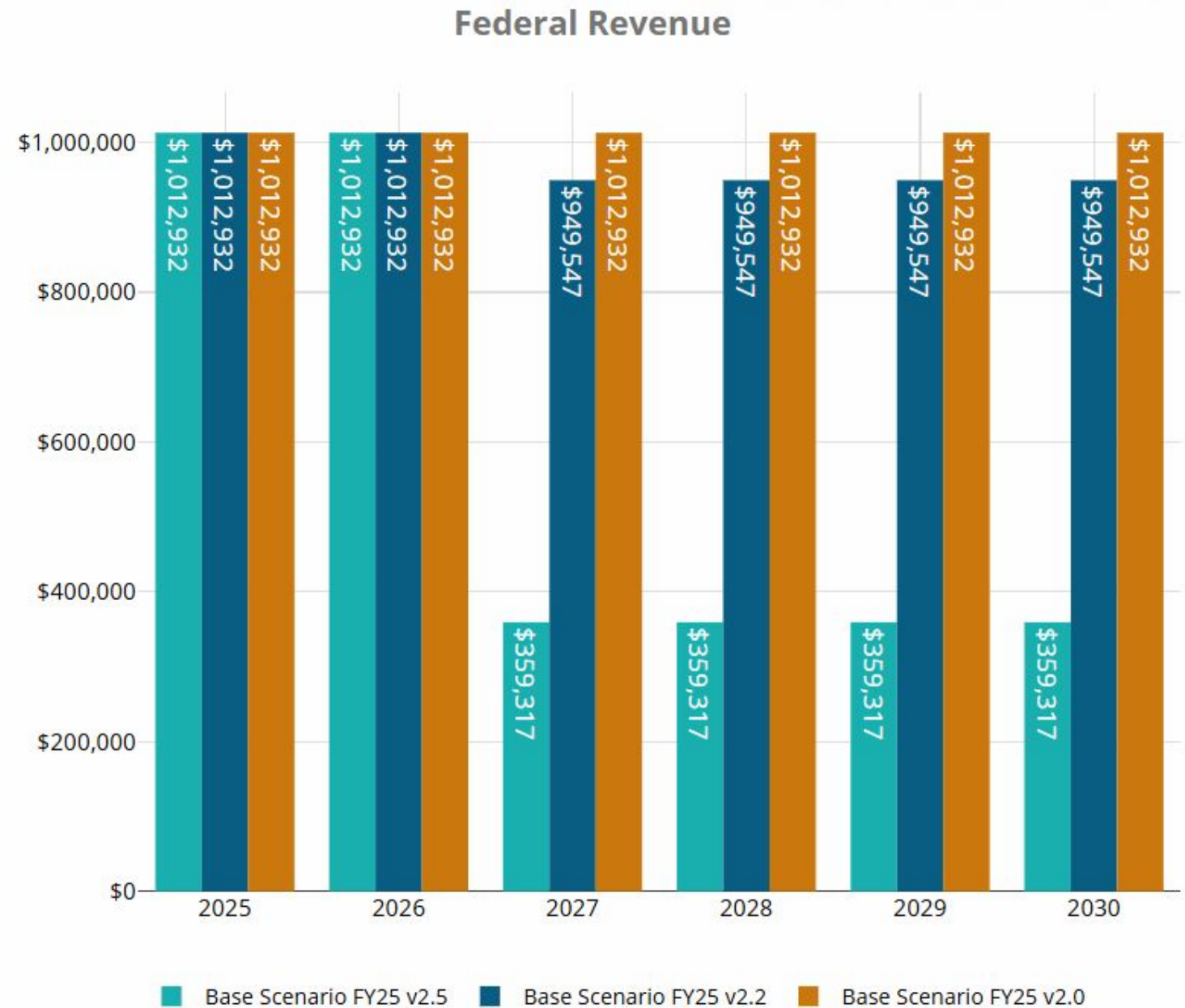
Supplemental Information



Modeling Future Financial Impacts

- Changes to federal grant funding.
 - Scenario 2.2 shows the possible impact of losing Title I
 - Scenario 2.5 shows losing IDEA Funding

*Projections performed in April 2025



Neighbors