Communicate Like a Leader: Tools for CSBOs to Engage Stakeholders

RISING LEADERS IN SCHOOL BUSINESS

Introductions

Casey DeFauw Role, Speaker

- Director of Communications, CUSD #300

Dr. Mark Orszula Role, Speaker

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Name: Nick Gulino, Moderator

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Communications & Community Engagement PDC

Mission: To provide professional development and information for school business officials and staff on public relations, marketing, social media and communications strategies; to engage stakeholders and promote community outreach engagement, recruiting and school branding activities.

Why Communication Matters for a CSBO

People rarely remember your spreadsheet.

They remember how well you explained it.

CSBOs communicate with:

- Board of Education
- Staff
- Community
- Taxpayers
- Media
- Municipal leaders

Poor communication creates uncertainty.

Clear communication builds trust before difficult decisions arise.

The 5 Questions Every Stakeholder Wants Answered

When communicating, answer:

Question	Stakeholder Thinking
What happened?	Give me the facts
Why does it matter?	Why should I care?
What is the impact?	How does it affect me?
What are we doing about it?	Is there a plan?
What happens next?	What should I expect?

Your Communication Toolbox

Internal Communications	**Community Communications**
• Staff email updates - Google templates • FAQ documents • Leadership team briefings • Department meetings	• Website updates • Board reports • Social media • Community newsletters
Visual Tools	**AI Tools**
• Frontline Analytics • ClearGov • OpenGov • Stokes Consulting Group • ISBE Excel dashboards	• Draft FAQs • Translate communications - know your community • Create first drafts of memos • Generate presentation outlines

From Numbers To Narrative

Example

Instead of:

"Transportation expenditures increased 12.4%."

Say:

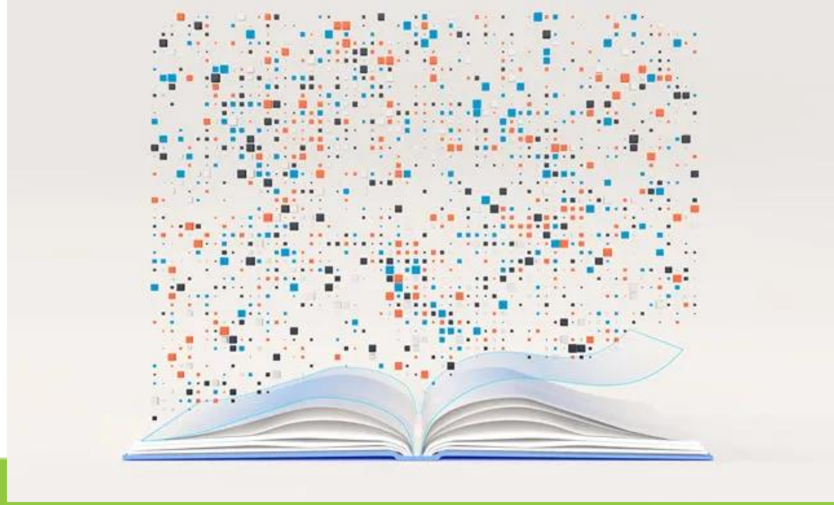
"Transportation costs increased due to driver shortages and higher contracted service rates, but the increase was anticipated and included in the budget."

What New CSBOs Often Do

- Share spreadsheets
- Explain accounting

What Stakeholders Need

- Impact
- Trends
- Context



CHSD 94 Budget

Lessons I Wish I Knew My First Year

Top 10 Tips for New CSBOs

1. Build relationships before you need them.
2. Never surprise your Board.
3. Keep emails short.
4. Lead with the headline.
5. Explain the "why."
6. Use visuals whenever possible.
7. Translate financial terms into plain English.
8. Anticipate questions.
9. Communicate bad news quickly.
10. Trust is your most valuable asset.

Casey (Communications Perspective)

- Consistency matters more than perfection
- Meet stakeholders where they are

Mark (CSBO Perspective)

- Prepare for difficult conversations before they happen
- Board communication should never contain surprises

Dan (CSBO Perspective)

- Communicate early and often during change
- Transparency builds credibility
- Simple beats comprehensive
- Don’t give examples that aren’t relevant

Activity - Rewrite This Message

Display:

> "Due to a projected variance in anticipated property tax collections, cash flow projections have been adjusted."

How would you explain this to:

- A board member?
- A parent?
- A staff member?

Three Things to Remember

Be Clear

- Avoid jargon.

Be Consistent

- Repeat key messages.

Be Proactive

- Communicate before people ask.

Great CSBOs manage finances. *Exceptional CSBOs manage trust.*

Key Takeaways

Takeaway #1

Communicate early.

- Most communication problems are timing problems.
- Stakeholders are much more forgiving of bad news than surprises.

Takeaway #2

Lead with the headline.

- Board members and staff rarely need every detail first.
- Start with the conclusion and then provide supporting information.

Takeaway #3

Translate finance into plain English.

- People don't care about fund balances.
- They care about programs, staffing, taxes, and student impact.

Takeaway #4

Build trust before you need it.

- Communication during a crisis is easier if you've already established credibility.

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Resource Slide

- IASBO CSBO Task Calendar
- ISBE Weekly Message
- Board Memo Template
- ASBO Website
- GFOA Website
- Board Meeting Calendar
- Crisis Communication Checklist
- Crisis Communication - Internal Comms - FIB - Template
- AI Prompt Example for Parent Communication for CSBOs
- Sample Community Financial Update

Questions and Answers

We thank you for your time!

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