

You are hired as the New CSBO!

Now What?

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Introductions

Steve Miller - Moderator/Speaker
Schaumburg SD 54, Assistant Superintendent

Melissa Morgese - Speaker
Addison SD 4, Assistant Superintendent

Cortnee Gutierrez - Speaker
E. F. Lindop SD 92, CSBO

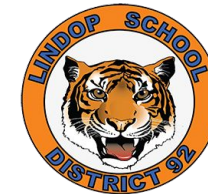
Katie Hannigan - Speaker
LaGrange Highlands 106, *Director of Finance&Operations*



SCHOOL DISTRICT 54
Ensuring Student Success



Addison 4
School District
ADDISON | ILLINOIS | SINCE 1842



LINDOP SCHOOL District 92

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IASBO / Peer Network

- **Professional Development**

- Schedule Professional Development events for the year
- Webinars/Workshops/Conferences
- Administrator Academies
- Join a PDC!

- **Peer Network**

- Identify and reach out to CSBO neighbors
- Regional meetings
- Similar Software Districts that are nearby
 - Great for Support Staff

- **IASBO Resources**

- Peer2Peer
- Illinois ASBOnline
- Micro-credentials
- Facilities Conference
- Payroll Seminar
- SupportCon / Rising Leaders / Bookkeepers
- Publications (Update / Journal of Sch.Bus.)
- Mentoring Services

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SUPERINTENDENT / BOE

Review/Discuss

- Build trust - consistency over time
- District Goals/Strategic Plan
- Construction / Facilities Projects
- Community / BOE Initiatives
- Communication Approach / Preferences
- Union Relations / Collective Bargaining
- Personnel Issues
- Litigation
- Long-term Financial Projections
- Areas of improvement / Feedback

Ideas/Options

- Weekly meetings / Updates
- Pre-Board Meeting to discuss important items Open/Closed Session
- Committees (Finance, Transportation, etc.)
- Joint meetings with Consultants (Legal, Construction, Financial, etc.).
- BOE Elections / Onboarding

BUDGETING & FINANCIAL REPORTING

Review / Analyze

- **ISBE Budget (Past 3 years)**
 - Trends
 - EBF Spending Plans / Wage Cap
- **Annual Financial Report (Last 3 years)**
 - Budget to Actuals / OEPP-PCTC
- **Long-term Projections / Strategic Planning**
 - Ensure stability / available funds
- **Audit (Last 3 years)**
 - Opinions / Internal Controls
- **Staffing / Enrollment Projections**
 - CBA – Capacity
- **Fund Balance Policy**

Networking/ Building Relationships

- **Supt / BOE** - How/What you report each month
- **Auditors** – Help with complex financial issues
- **Budget Administrators** – Coding / Tracking
- **Finance Committee** – Support / Audience
- **County Clerk / Assessor** – Levy / Development
- **Financial Advisors** – Debt
- **County/ROE/Township Assessor** - Levy (EAV and New Property)

INVESTMENTS / CASH FLOW

Review / Analyze

- Account Signatures / Online Access
- Who is Bonded? - Handling Cash
- Petty Cash / Imprest
- Cash Flow projections
- Current portfolio - Short/Long term maturities
- Debt Schedules
- Leasing Schedules

Relationships

- Bank Representative / Local Branch
- Investment Advisors
- Auditors
- Schedule meetings with applicable reps

TECHNOLOGY

Review

- Lease agreements
 - Student/Staff devices
 - Copier/Printers
- Cyber Security
 - Insurance coverage / Controls
- Accounting/Financial Software
 - Absences, Payroll, State Reporting
- Onboarding/Termination process
 - Employee experience

Building Relationships

- Leasing - Vendor Contacts
 - Replacement Schedules / Resale
- Cyber Security / Insurance contacts
- Software representatives
- Weekly / Semi-monthly meetings with Technology Director

CAPITAL PROJECTS / OPERATIONS

Review

- Current fiscal year projects
- Facilities Plan
- Life Safety 10-year assessments
- Energy Efficiency programs
- Mechanical Equipment Replacements
- B&G Staff
- Snow Removal / Inclement Weather Plans
- Workers Compensation / Property Damage

Relationships

- O&M Director
- Building Principals
- Architects
- Construction Manager
- Liability Insurance Rep
- Workers Comp Provider

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STAFFING / PERSONNEL

Review

- Union Agreements
- FTE counts / Locations - Position Control
- Salary/Benefit Budgets
- District Organizational Structure
- Business Office staff organizational structure and capabilities
- Collective Bargaining Agreements

Relationships

- Your Team
- Human Resources (Workflow)
- Superintendent
- Principals
- Union Leadership

[asd4](#)

[My Team](#)

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TRANSPORTATION

Review

- Contracting/In-House
- Union Agreements
- Routing Process
- Staffing
- Equipment Status
- Bus Accident Procedures
- Daily Coverage (Morning/Afternoon)
- Hazardous Routes Resolution
- Parent Guidance/FAQ (Decision Tree, etc.)
- Transportation Claim

Relationships

- Transportation Director
- Transportation Staff
- Building staff responsible for transportation
- Contractors
- SRO / Dean / Principal
- Nearby Districts (Sharing services)

FOOD SERVICE

Review

- Contract/In-House
- Union Agreement
- NSLP
- Staffing
- Supply Chain issues
- Pricing
- Satellite district(s)
- Point of Sale (Revenue)

Relationships

- Food Service Director/Manager
- Building staff involved with food service
- Food Service Committee
- Satellite district(s)
- Principals/Front-Office

What do you need access to?

- **District**

- Email
- Financial System
- BoardDocs
- SIS
- Website/Intranet
- Payment Systems (e.g. RevTrak)
- Insurance Portals
- Bank Accounts

- **School Business**

- IASBO - Peer 2 Peer
- ASBO International
- GFOA

- **Local Government**

- County Treasurer - Tax agency portal
- County Clerk - Tax distribution portal

- **State Government**

- IWAS
- GATA
- MyTaxIllinois
- IMRF
- TRS
- Employer Access
- Gemini
- IDES
- PCG

- **Federal Government**

- SAM.gov
- IRS (TCC & Fire)
- ID.Me

Questions and Answers

We thank you for your time!

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Presenters:

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