**Transition Guide for**

**School Business Officials**

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**Keys to a Smooth Transition**

Whether you are an outgoing or incoming school business official, this guide provides a list of suggested tasks and considerations to help you in your transition. It is a product of a 2014 Illinois ASBO Annual Conference breakout session in which Illinois ASBO members compiled a list of items that they felt were most critical to job transitions. This guide is not all-inclusive and includes space to add your own areas of interest. The suggestions inside can help build stronger relationships and enable new SBOs to acclimate to their districts more quickly.

**HIGH PRIORITY TASKS**

**PRE: TRANSITION DAYS WITH OUTGOING CSBO**

**General Task**

* Inquire about arranging several work days with outgoing/incoming CSBO.

**Specific Tasks**

* Ask your current superintendent for permission for several days of transition time, noting that you will return those days back after you start your new job.
* Ask the outgoing/incoming SBO for acceptance and schedule time as far in advance as possible.

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**1: BUDGET**

**General Tasks**

* Determine status of the current budget.
* Find copies of current, past and amended budgets along with all presentations and charts. Determine any trends or unusual patterns.

**Specific Tasks**

* Walk through the budget calendar and process. Explain what has been done thus far.
* Note the key assumptions and drivers.
* Note areas of focus for the final budget presentation and explain board expectations for the final budget hearing.
* Review budget approach with principals and other school administrators in completing the budget process.
* Discuss the account structure and determine how closely it aligns to IPAM.
* Discuss how contingency funds are built into the budget.
* Determine if there is a practice of amending the budget.

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**2: AFR / AUDIT**

**General Task**

* Find copy of past AFR and Audit.

**Specific Tasks**

* Review past AFR / Audit and Management Letter.
* Review budget to actual variance.
* Discuss any noteworthy issues.

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**3: TAX LEVY**

**General Tasks**

* Review past levy strategies and acceptable levy practices.
* What is the long-term vision for the district and how can the tax levy strategy support that vision?

**Specific Tasks**

* Review the previous year extension noting current levy rates for each fund.
* Find out if a “balloon” levy would be accepted by the board/community.
* Review current debt schedules and terms of debt issuance, including prior referendums.
* Discuss any PTAB interventions and note any intergovernmental agreements among the municipalities.
* Review district EAV and new construction from previous years.
* Review potential expiring TIFs.
* Does past practice show a tax levy hearing regardless of the proposed increase?

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**4: UNION CONTRACT & RELATIONS**

**General Tasks**

* Determine how many bargaining groups there are and when current contracts expire.
* Know how to access the current contracts and note the key agreed upon terms from the last negotiations.
* Determine if there are any unique terms or benefits.
* Determine if there are any memorandums of understanding or other changes to the current collective bargaining agreement.
* Ask for instructions on union leadership.

**Specific Tasks**

* Identify union reps for each bargaining unit and review contracts for bargaining groups.
* Discuss past negotiations and current state of the relationship (stable, positive, toxic).
* Identify which districts are considered part of the BOE peer group.
* Identify how comparative data gets assembled (email, Forecast5 group etc.).
* Discuss the SBO’s role in managing union relationships and what the SBO’s role is in the negotiation process.
* Find out if outgoing SBO conducted regular meetings with union leadership and if so, schedule as appropriate.

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**5: OTHER CONTRACTS**

**General Task**

* Become familiar with all major vendor contracts and understand your role.

**Specific Tasks**

* Provide a list of all major multi-year contracts.
* Discuss the vendors that you trust and the ones for which you are considering other alternatives.
* Note any vendors with strong ties to key district personnel that you should be aware of.
* Discuss your role in the RFP and bidding process (especially for large ones).

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**6: FINANCIAL SYSTEM**

**General Tasks**

* Know the key points in training on the financial system.
* Identify the appropriate lead or technical expert(s).

**Specific Tasks**

* Review how well the current system is working and discuss long term plans for continuation.
* Indicate the point person for issues and modifications to system.
* Schedule training for system as necessary.
* Review any custom reports created and, if necessary, learn how to create them.

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**7: FINANCIAL REPORTS**

**General Task**

* Review the monthly board packet and key financial reports.

**Specific Tasks**

* Determine if there are financial reports that are not a part of the monthly board reports.
* Determine how reports are compiled and by whom.
* Review the process for completing financial and treasurer reports.
* Find out if there is a need to change current reporting practices.
* Review other reports that the board reviews in the packet (student activity funds, etc.).
* Review reports generated for other district staff (perhaps informally distributed).
* Review reports that help the SBO monitor the financial progress throughout the year.
* Are periodic year-end projections expected?

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**8: YEAR-END CLOSE**

**General Tasks**

* Determine what activities need to be completed to finish the year-end close.
* Discuss the audit timing and procedures.

**Specific Tasks**

* Discuss any journal entries needed to close out one year and be ready for a new one.
* Determine if you are the point person for the audit or someone else in your department.
* Understand the current contract and relationship with auditors.
* Note any significant past or current audit issues.

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**9: PHILOSOPHY / MINDSET OF THE SUPERINTENDENT**

**General Task**

* Discuss expectations and preferences of superintendent.

**Specific Tasks**

* Find out the superintendent’s (and/or board’s) long-term vision and how the finances can play a supporting role in achieving success.
* Find out the level of involvement from superintendent regarding financials (budget, levy, spending limit, approval preference, etc.).
* What is the superintendent’s role in fiscal presentations to the BOE?

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**10: BUSINESS OFFICE STAFF INTRODUCTIONS**

**General Task**

* Ask for tips and insight into the district office as you plan your introductions.

**Specific Tasks**

* Plan out how you will introduce yourself to your team.
* Plan a team meeting with an “ice breaker” so people get to know you and vice versa.
* Plan individual meetings to share your expectations for the coming year.

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**11: PERSONALITIES ON YOUR TEAM**

**General Task**

* Discuss department staff strengths and weaknesses.

**Specific Tasks**

* Review personnel files of staff.
* Find out if there are ongoing personnel issues.
* Discuss work styles, work hours and preferences of the staff with outgoing SBO.

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**12: BUILDING RELATIONSHIPS**

**General Task**

* Determine if there are any trust issues or other areas of concern among peer groups, subordinates, superintendent and/or the BOE.

**Specific Tasks**

* Ask for insight into district culture and discuss any tips on earning the trust of peers.
* Discuss any individuals that may need to be a point of attention in this area.

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**13: CONTACTS**

**General Tasks**

* Find out who the key contacts are on the district leadership team.
* Find out who the key contacts are in the community including the villages, park districts, PTA, etc.

**Specific Tasks**

* Find out who will be the person that will be most helpful in getting acclimated.
* Ask if there is anyone that is expected to be difficult to work with and why.
* Find out if there is a natural collaborative relationship among city/township administrators.
* Ask about peer districts and figure out who among them will be your “go to contact.”

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**14: BANKING SERVICES**

**General Tasks**

* Execute all necessary banking changes.
* Discuss satisfaction with current banking relationship.

**Specific Tasks**

* Complete Signature change.
* Discuss internal controls and fraud prevention.
* Review current banking provider and when the last time an RFP was done.
* Discuss any recent banking changes or items under consideration.
* Note when bank reconciliations are completed and who does them.
* Determine status of bank reconciliations.

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**15: CASH FLOW / FIVE YEAR PROJECTIONS**

**General Task**

* Obtain copies of cash flow and financial forecast reporting including all assumptions.

**Specific Tasks**

* Note cash flow low points and ask if short-term borrowing or transfers are needed.
* When considering the assumptions, ask if the long-term financial outlook warrants change for next year.
* Ask about fund balance goals.
* Find out if you are responsible for the forecasts/cash flow projections or if an outside firm will assist.

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**16: INSURANCE**

**General Tasks**

* Obtain and review the district’s insurance plans and find out who the contact is for each associated company.
* Ask if the district is self-insured or a member of a cooperative.

**Specific Tasks**

* Find out if there have been any recent plan design changes or if there need to be in the future.
* Ask if there is any type of insurance committee that you may be a part of or lead.
* Review the design and structure of the district health insurance plan and discuss any potential union implications.
* Access historical plan and rate documentation for all insurance.
* Note any areas to consider in the future to help make the plan more cost effective.

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**17: ROLES OF STAFF**

**General Task**

* Find out which individuals in the business office handle responsibilities that are not listed in the job descriptions.

**Specific Tasks**

* Who handles:
  + Payroll
  + Benefits
  + AP
  + AR
  + Secretarial functions
  + Assistance with the budget
  + Special projects

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**18: CHAIN OF COMMAND**

**General Task**

* Discuss and review direct reports.

**Specific Task**

* Review organizational chart and discuss any recent or potential changes.

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**19: GAIN ACCESS TO PREVIOUS SBO FILES INCLUDING PAPER AND ELECTRONIC**

**General Task**

* Seek permission to gain access to financial/operations papers and electronic files.

**Specific Tasks**

* Review the structure/organization method of paper and electronic files with outgoing SBO. Note the use of all “shared drives” and who has access to which folders.

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**20: EMAIL FORWARDING**

**General Task**

* Ask IT to forward emails from previous SBO to the new SBO for a period of time.

**Specific Task**

* Schedule time with IT for help. Use this meeting as an opportunity to discuss tech initiatives as well.

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**21: LOGINS AND PASSWORDS**

**General Task**

* Get list of system passwords until all have been reset (e.g. IWAS).

**Specific Task**

* Contact IT or outgoing SBO for help. Consider use of this format:

Website:

Login:

Password:

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**22: FACILITIES**

**General Task**

* Talk to facility director and architect of record.

**Specific Tasks**

* Understand the condition of the buildings.
* Ask if there is a facility master plan and/or capital replacement plan in place.
* Review most recent Health Life Safety Inspection.

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**ADDITIONAL TASKS**

***As time allows***

**23: STRATEGIC PLAN**

**General Tasks**

* Access copies of the district’s strategic plan.
* Understand your goals and role in supporting the plan.

**Specific Task**

* Schedule time to review and discuss the strategic plan with the superintendent and any components you are expected to support or lead.

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**24: STAFF EVALUATION**

**General Tasks**

* Review your direct reports most recent evaluations.
* Know the timing and process for both your evaluation and your staff evaluation (note: multi-year contracts must have annual goals attached).

**Specific Tasks**

* Provide a list of all staff with their last evaluation date and discuss the highlights of each.
* Understand the process for your evaluation with your boss. Look at the Illinois ASBO Evaluation Guide for School Business Officials for a suggested evaluation process.
* Determine how and when salary increases are communicated.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**25: GRANTS / SPECIAL ED**

**General Tasks**

* Determine what grants the district currently receives and who is responsible for them.
* Note if the district has any outsourced or cooperative special education providers.

**Specific Tasks**

* Review a list of all grants that fund the district. Note who (program side) is responsible for the grant including the application and claim process.
* Ask if the district belongs to a special education cooperative.
* Find out how the district compares with private placements compared to similar districts.
* Ask how costs are trending in Special Ed.
* Find out if there are any recent changes to programs and services.
* Find out how closely state and federal revenue (including Medicaid) is monitored to ensure maximum claims are achieved while remaining compliant.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**26**: **MISCELLANEOUS PROJECTS**

**General Task**

* Discuss any on-going projects.

**Specific Tasks**

* Document and review any projects that will need completion.
* Determine the top priorities and deadlines for completion of these projects.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**27: OFFICE CULTURE**

**General Task**

* Ask how formal the culture of the office is.

**Specific Tasks**

* Find out the district office hours of operation.
* Ask if there are specific expectations for attire and if they are seasonal or dependent on schedules.
* Ask if there are specific events (including school events) in which your attendance is appreciated or required.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**28: BUSINESS OFFICE MEETINGS**

**General Task**

* What is the business office culture and climate?

**Specific Tasks**

* Determine the frequency, how agendas have been set and how formal these meetings have been.
* Ask the outgoing SBO about meeting productivity and if they would change anything about the way the team meets.
* Determine if you will make changes to the meeting culture and when.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**29: OFFICE SOCIAL NORMS**

**General Task**

* Ask about staff socialization during or after work.

**Specific Tasks**

* Find out if it’s common for staff to eat at their desk, or if it’s expected that you go out with the group.
* Ask if staff in the office socializes outside of the office and if it’s encouraged or discouraged.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**30: VENDOR CONTACT LIST**

**General Task**

* Ask the outgoing SBO for a complete vendor list.

**Specific Task**

* Import electronic contacts if possible.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**31: ENROLLMENT PROJECTIONS**

**General Task**

* Get access to student enrollment projections including assumptions and methodology.

**Specific Tasks**

* Confirm who is responsible for enrollment projections and review most recent documents.
* Ask about past enrollment discussions and how to best prepare for changes.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**32: INTERNAL BUSINESS OFFICE CALENDAR**

**General Task**

* See if there is a district specific calendar noting tasks for each month.

**Specific Task**

* Ask for a copy from business office personnel.

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**33: DEPARTMENT DUTIES**

**General Task**

* Determine what tasks, if any, overlap with the business office creating shared responsibility.
* Identify how collaboration occurs.

**Specific Tasks**

* For example, determine what HR handles versus business office (i.e. benefits, payroll).

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**34: STAFF ASSESSMENT**

**General Task**

* Inquire about the strengths and weaknesses of staff in the department.

**Specific Tasks**

* Who is naturally good at number crunching?
* Who may have issues with accuracy?
* Who in the office is a strong communicator?

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**35: MEET WITH BOARD MEMBERS**

**General Task**

* Find time to get to know board members outside of monthly meetings.

**Specific Task**

* Ask superintendent to help seek opportunities for dinners and other functions off campus (i.e. Ed advocacy, IASB).

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**36: MEET CITY/VILLAGE OFFICIALS**

**General Task**

* Ask for introductions and meetings with key city/village officials.

**Specific Tasks**

* Ask superintendent for introductions.
* Schedule meetings to discuss econ development (TIF, etc.).

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**37: VENDOR REPRESENTATIVES**

**General Task**

* Schedule introductory meetings with key vendors from each major area of interest.

**Specific Tasks**

* Set up meetings with:
  + Health/Dental
  + Worker’s Comp
  + Property/Liability
  + Transportation
  + Food Service

**Status/Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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