

# **TREASURER SEARCH PROFILE**

**Great Oaks Career Campuses**

**Cincinnati, Ohio**

**March 8, 2017**



**Prepared for the Board of Education**

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## **TREASURER SEARCH PROFILE REPORT**

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This report presents the summary of findings from the Treasurer Search Profile Development Questionnaire conducted by K-12 Business Consulting during the period February 21, 2017 through March 7, 2017. The profile development questionnaire form was used to provide a framework for reporting the information compiled in this report. In accumulating the data used in this report K-12 Business Consulting also sought from respondents their opinions, recommendations and general comments with respect to preferred candidate characteristics, traits, qualifications and personal demeanor, as well as organization strengths, weaknesses, issues and concerns which may have a bearing on future financial leadership strengths for your next Treasurer/CFO.

K-12 Business Consulting offered focus group meetings with the central office management team, district deans and directors, business office staff, district office staff, teachers and other district staff to gather data around the broad themes represented in the questionnaire and to rank important job characteristics. K-12 Business Consulting met with a total of 32 staff in each of six group meetings and an individual meeting with the CEO on March 7, 2017. Many of the thirty-six board of directors and other staff completed the profile to gather their insights and to seek other helpful information as to skills and any additional characteristics the Treasurer/CFO candidates should possess. The results of the 52 questionnaires we received are included in this report.

Broad themes were highlighted in each question area into six (6) response groups (board of education, management team, deans and directors, business office staff, other district office staff and other staff. The response group's common themes were identified under each question in the report. The first category titled "Consistent" are comments which were frequently heard from all or nearly all response groups. Comments heard less frequently or only heard in a specific response group are listed under that response group. The responses noted under "Consistent" for any of the response groups are noted with the highest frequency first then descending to less frequently heard. If there was only a single comment in any response group without any repeating similar comments those items were not listed. It is important to note that the data is not a scientific sampling, nor should they necessarily be viewed as representing a majority opinion of those interviewed in the response group.

K-12 Business Consulting and the Ohio Association of School Business Officials would like to commend the Board of Directors for its efforts to include many key stakeholders in the development of the Treasurer Search Profile. Many respondents expressed positive feelings about being involved in this process and the opportunity to help shape the future of the Great Oaks Career Campuses. We would also like to thank Mr. Harry Snyder, CEO/President, and Ms. Mary Beth Smith, Administrative Assistant, for the professional manner in which all arrangements were made to accommodate the staff engagement meetings.

## **STRENGTHS OF THE CAREER CAMPUSES**

**Question #1: What do you consider to be the two or three most significant strengths of Great Oaks?**

### **CONSISTENT**

Strong staff  
Financially stable  
Strong business/community partnerships  
Excellent reputation

### **BOARD OF DIRECTORS**

History of excellence  
Breadth of career offerings at both high school and adult education  
Proactive and collaborative leadership that shares a common vision  
Financial stability and management  
Excellent administrators, staff and students

### **MANAGEMENT TEAM**

Strong staff  
Exciting career training programs for secondary and adult students that lead to career and personal success  
Financially stable  
Strong business/community partnerships  
Diversity of students at campuses and at satellite programs

### **DEANS AND DIRECTORS**

Strong college and career readiness opportunities  
Reputation as leader in career tech  
Strong business/community partnerships  
Strong relationship with partner schools

### **BUSINESS OFFICE STAFF**

Strong college and career ready opportunities  
Experienced staff who cares about students  
Strong financial management and stability  
Recognized for excellence in financial reporting (GFOA and ASBO awards)

### **OTHER DISTRICT OFFICE STAFF**

Strong and committed staff  
Excellent reputation as a career tech leader  
Variety of excellent college and career ready opportunities  
Seasoned administrative leadership and shared vision

### **OTHER STAFF**

Strong college and career ready opportunities  
Strong staff  
Excellent student placement to ensure success  
Financial stability

## **IMPORTANT ISSUES FACING DISTRICT**

**Question #2: What do you consider to be the two or three most important issues facing Great Oaks?**

### **CONSISTENT**

Upcoming levy in 2018  
Career tech funding uncertainty at the state level  
Remaining current/relevant in educational offerings to meet employer needs  
Continue to strengthen partnerships with affiliated districts  
Student recruitment/enrollment stress and student retention

### **BOARD OF DIRECTORS**

Upcoming levy in 2018  
Career tech funding uncertainty  
Remaining current/relevant in educational offerings to meet employer needs  
Constantly changing state mandates and keeping staff upto date with professional development  
Aging facilities and equipment  
Student recruitment/enrollment stress and student retention

### **MANAGEMENT TEAM**

Upcoming levy in 2018  
Staff continually updating their skills to meet the needs of students  
Capital expenditure needs  
Sustaining student enrollment

### **DEANS AND DIRECTORS**

Meeting graduation requirements while remaining focused on career preparation  
Upcoming levy in 2018  
Student recruitment/enrollment stress  
Equipment replacement needs for high cost programs

### **BUSINESS OFFICE STAFF**

Upcoming levy in 2018  
State funding uncertainties and constant changes in legislation  
Continue to strengthen partnerships with affiliated districts  
Student recruitment/enrollment stress

### **OTHER DISTRICT OFFICE STAFF**

Upcoming levy in 2018  
Career tech funding uncertainty at the state level  
Eliminating the career tech stigma of a second class education  
Student recruitment/enrollment stress

### **OTHER STAFF**

Upcoming levy in 2018  
Staff recruitment with upcoming key retirements  
Remaining current/relevant in educational offerings to meet employer needs

## **CHARACTERISTICS OF NEW TREASURER**

**Question #3: Please tell us your two or three characteristics that you think the Board should look for in a new Treasurer.**

### **CONSISTENT**

A person who possesses strong communication and interpersonal skills  
A thorough knowledge of Ohio law with emphasis on career technical schools  
Proven school treasurer experience  
Strong collaboration with all stakeholders and who is a team player  
Ability to communicate complicated financial data to all audiences

### **BOARD OF DIRECTORS**

A person who will have clear, proactive and respectful communication skills with all stakeholders  
Proven school treasurer experience  
A strong collaborator with all stakeholders and someone who will work well with the management team  
Thorough knowledge of Ohio law with emphasis on career technical schools

### **MANAGEMENT TEAM**

Strong communication ability coupled with interpersonal skills in dealing with stakeholders  
Thorough knowledge of Ohio law with emphasis on career technical schools  
Proven school treasurer experience  
An individual who will be a team player and work well with others on the team  
A person who possesses innovative ideas on financial management

### **DEANS AND DIRECTORS**

An individual who can communicate processes, expectations to staff, administrators and instructors  
An individual who has experience as a public school treasurer  
A person who will work hard to be a team player and valued member of the management team  
A person who can think outside the box and be innovative

### **BUSINESS OFFICE STAFF**

Strong communication and interpersonal skills with all stakeholders  
Needs to have school treasurer experience for this large and complex organization  
Respectful toward staff and maintains an open door policy  
An individual who will value input from others and supports their work

### **OTHER DISTRICT OFFICE STAFF**

Strong communication ability and willing to teach others about requirements  
A person who has had school treasurer experience  
A team player who is approachable and willing to help  
A person who will support staff and be willing to let them own their work duties

### **OTHER STAFF**

An individual who can communicate difficult and complex information in layman terms without "treasurer talk"  
A person who is a current school treasurer  
The person needs to understand Ohio law concerning school finance  
An individual who can help solve problems and move the organization ahead

## TREASURER CHARACTERISTICS BY RANKING

CRITERIA	BOE	MGMT. TEAM	DEANS & DIR.	BUS. OFF. STAFF	OFFICE STAFF	OTHER STAFF
Ability and willingness to deal fairly with faculty, staff, students and other stakeholders	4	1	4	4	3	4
Expertise in using operating system Software (e.g. accounts payable, payroll, budgetary)	8	7	8	8	9	10
Expertise in design and implementation business office procedures	9	9	10	9	8	7
Effective at communicating district finances in both written and verbal form	5	3	3	6	2	5
Successful experience as a treasurer or assistant treasurer *	3	2	2	1	1	1
Experience with career technical school financial management	2	6	6	2	7	3
Knowledge of Ohio Laws and legislation concerning career technical center finances	1	4	1	3	6	2
Organizational and management skills	6	8	7	7	4	6
Personal involvement and interest in the career center programs **	10	10	9	10	10	8
Experience in state and federal financial reporting	7	5	5	5	5	9

**\*1= MOST IMPORTANT**

**\*\*10 = LEAST IMPORTANT**

### RANKING OF TOP AND BOTTOM FIVE (5) IMPORTANT CHARACTERISTICS ALL GROUPS

#### RANK TOP 5 CHARACTERISTICS

- 1 Successful experience as a treasurer or assistant treasurer
- 2 Knowledge of Ohio Laws and legislation concerning career center finances
- 3 Ability and willingness to deal fairly with faculty, staff, students and parents
- 4 Effective at communicating district finances in both written and verbal form
- 5 Experience with career technical school financial management

## **RANK      BOTTOM 5 CHARACTERISTICS**

- 6    Experience in state and federal financial reporting
- 7    Organizational and management skills
- 8    Expertise in using operating system software
- 9    Expertise in design and implementation business office procedures
- 10   Personal involvement and interest in the career center programs

It should be noted that regardless of the rankings of the characteristics on the previous page, each of these characteristics are important to the long-term success of the new Treasurer/CFO of the career center. The ranking help identify the most important characteristics desired at the time of the survey by the majority of the respondents. The most successful candidates for this position will be able exemplify this top 5 list through career history and work experiences.

While not ranked, or noted often in written comments on the Search Profile Questionnaire, many individuals mentioned in the face-to-face group discussions that a person in the Treasurer/CFO position should be honest, trustworthy and of high moral character. We wanted to acknowledge these important characteristics and traits and note that this will be a part of the vetting process along with other characteristics noted.

## **SUMMARY**

The information gathered from the surveys reflects a fairly consistent picture of the strengths, important issues facing the organization, as well as the characteristics desired of the new Treasurer/CFO for the Great Oaks Career Campuses. The respondents were clear that this is a very important person to the overall health of the organization serving an integral role in the day-to-day operations of the organization as well as a key player in long term strategic planning and problem solving as it relates to the growing uncertainty of State funding for career centers, the upcoming 2018 renewal levy and the consistent changes in laws governing the organization.

The overarching issue raised by all groups was the next Treasurer/CFO must be an experienced treasurer and possess the ability to be an effective, proactive communicator who seeks to be a team player and collaborator. This individual must be able to explain organization financial information to all stakeholders with skill and confidence making complex financial information understandable to a wide array of backgrounds. This will be especially important as the organization navigates their upcoming levy and advocates for career technical state funding at the state level.

The successful candidate must maintain an open-door policy, be approachable and possess out of the box innovative thinking. This person must understand career technical school funding as well as the importance of strong business and community partnerships necessary for the organization to continue to thrive and maintain its excellent reputation as the premier career center in the state for producing college and career ready students and adults for the surrounding community.

While a top strength of the organization is its financial stability State funding and the upcoming levy are its greatest challenges. Great Oaks Career Campuses is considered the premier career technical school in the State of Ohio. The organization is afforded the advantage of offering a diverse range of educational programs for both its secondary and adult students on several campuses and at 28 satellite programs. While the organization has a strong enrollment, their challenge will be remaining up-to-date and relevant

in an ever-changing world which includes continued modifications to Ohio Department of Education graduation and program requirements.

Those that we interviewed spoke of the importance of the treasurer to think creatively to solve problems and think “outside the box”. The successful candidate must be a team player working collaboratively among all stakeholders. He or she must be approachable and open to varying opinions.

It is certain that no one person could possibly embody all the characteristics that were mentioned for each and every attribute. However, in reconciling the many concerns and characteristics sought for the Treasurer/CFO for the Great Oaks Career Campuses, in addition to the major areas of financial management and technical knowledge noted above, the respondents recognize the need for strong interpersonal skills who will deal fairly and respectfully with all stakeholders.

The organization faces many of the same challenges faced by most Ohio career technical centers and regular public schools; however, they are the challenges that will be of interest to the right Treasurer/CFO candidate. We believe we will find the right candidate(s) who have the attributes outlined above, possess the skills and energy needed to address the issues and concerns expressed by respondents, and, who will be eager to be a part of the Great Oaks Career Campuses.