

CROSS-TRAINING AND TRANSITION PLANNING

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INTRO AND BACKGROUND

- Melissa Fettkether
 - SBO since 2006
 - Served in 3 districts ranging from 65 students - 850 students
 - Currently SBO at Postville Community School
- Kris Smith
 - SBO since 2013
 - Served in 1 district 500 students
 - Currently SBO and Business Manager at South Winneshiek CSD

CROSS TRAINING YOUR STAFF



IMPORTANCE OF CROSS TRAINING

- Turnover of staff
- Emergency situations
- Reliable back up/assistance
- Helps with internal control

BUSINESS OFFICE PROCEDURE MANUAL

- Used internally within Business Office
- “Hit by a Bus Book” or “Won the Lottery Book”
- Idea is that if something happened to anyone in the office, someone could use this manual to step in and complete their tasks without major interruption to the workflow.
- This type of manual is also very important in small offices or “one man shops”
- Can be used in training new staff members

WHERE DO YOU START?

- Create your table of contents by collecting:
 - Job descriptions
 - Daily, Monthly, Quarterly, Annual task lists
 - Deadline calendars
- Write step by step instructions for each task
 - Each person was responsible for submitting instructions for their job duties
 - They sent to me and I revised, organized etc.
 - Snagit or Snipping Tool is a great tool for visual instructions

WHAT DOES IT LOOK LIKE?

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WHAT DOES IT LOOK LIKE?

<input type="checkbox"/>		Task Subject	Status	Due Date
		Click here to add a new Task		
<input type="checkbox"/>		Line Item Budget	Not Started	Fri 9/17/2021
<input type="checkbox"/>		ASBO Presentation	Not Started	Tue 9/28/2021
<input type="checkbox"/>		Driver Authorizations	In Progress	Wed 9/29/2021
<input type="checkbox"/>		Child Development/Headstart Lunch Invoice	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Current Month's State Receipts	Not Started	Thu 9/30/2021
<input type="checkbox"/>		DHS Child Support Website Check	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Monthly Donations List for Board	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Monthly Lunch-Updates to Spreadsheet	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Medicaid Info-Reports	Not Started	Thu 9/30/2021
<input type="checkbox"/>		K-3 At Risk Budget/Claim Form	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Quarterly IA Sales Tax	Not Started	Thu 9/30/2021
<input type="checkbox"/>		IPERS Eligibility Check	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Quarterly Iowa Withholding Tax Return	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Account Codes	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Birthday List	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Open Enrollment/HSAP Verification/Certified Enrollment	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Negative Lunch Accounts	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Square-Run Reports and Complete Entries	Not Started	Thu 9/30/2021
<input type="checkbox"/>		JMC Online Payments	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Current Month's Tax Receipts	Not Started	Thu 9/30/2021
<input type="checkbox"/>		Bank Account Reconciliations	Not Started	Fri 10/1/2021
<input type="checkbox"/>		CASA Budget/Claims	Not Started	Fri 10/1/2021
<input type="checkbox"/>		Early Intervention	Not Started	Fri 10/1/2021
<input type="checkbox"/>		Create SPED Agreements	Not Started	Fri 10/1/2021

Subject: **CASA Budget/Claims**

Start date: Fri 10/1/2021 Status: Not Started

Due date: Fri 10/1/2021 Priority: Normal

Reminder: None Reminder Time: None

Watch for DE Info on Submitting Application
 Submit Quarterly Claims in Portal CASA App
 Spreadsheets for Budgeting and Tracking for Each Type is in the Title folder
 Final Due on 7/15
 See Budget Files under Title Folder

FY2022

Title I 431 4501 \$291,490
 \$ 1st Qtr.
 \$ 2nd Qtr.
 \$ 3rd Qtr.
 \$ 4th Qtr. Paid
 \$0.00 Balance

Title IA School Improvement (SINA) 432 4501 \$0.00??
 \$ 1st Qtr.
 \$ 2nd Qtr.
 \$ 3rd Qtr.
 \$ 4th qtr. Paid
 \$0.00 Balance

Title 1C-Migrant 439 4503 \$234,623
 \$ 1st Qtr.
 \$ 2nd Qtr.
 \$ 3rd Qtr.
 \$ 4th Qtr. Paid
 \$0.00 Balance

Title IIA 4643 \$32,437
 \$ 1st Qtr.
 \$ 2nd Qtr.
 \$ 3rd Qtr.

HOW DOES IT WORK?

- To be dependable, the backup needs to feel comfortable
- Occasionally have staff perform the task of others
 - Process payroll
 - Run accounts payable checks
 - Import subs
 - Etc.

NOW WHAT?

- Test it
- Continually update/revise/improve
- Make sure all staff members have copies or access, as well as an electronic version
- Annually take time to talk about updates as a staff
- It takes time but is important

TRANSITION PLANNING



TRANSITION PLANNING

- What to prepare for your successor
- Why is it important
- When do you start

WHAT TO PREPARE

- Month by month deadlines, task lists
- Common websites they will need and how to get access/passwords
- Monthly journal entries/payments/etc.
- Depending on experience, may want to leave more detailed information
- Make sure they have access to all of your documents/drives/google
- Updates on construction projects, debt schedules, upcoming needs

WHERE TO START

- Critical dates calendar
- Google or Outlook calendar
- Can be as detailed as you want or need to make it
- Start to add details to whatever you use for reminders
 - Many SBOs create detailed instructions and update each time they go through as needed
 - This would be priceless in the event of an emergency as well as during a transition

VERY IMPORTANT INFORMATION

- Federal ID Number
- State Tax ID Number
- School District Number
- DUNS Number
- IPERS or State Pension Number

OTHER IDEAS

- Set up introductory meetings with key vendors before you leave when possible
- Make sure they have access to your email and also add an “out of office” with their information
- Arrange for transition days that you can work together
- Welcome questions/conversations after you have left
- If you are retiring, try to have an overlap time that you can train your successor

WHY IS THIS TRANSITION SO IMPORTANT

- Their immediate success is reflection on you and our profession
- Depending on timing, they may be closing out year that was your responsibility
- You worked hard to get things to a good place and you want it to continue
- Right thing to do

WHAT IF I AM THE NEW SBO?

- First of all, try to ensure that the ideas mentioned previously can be arranged
- Once you are in the position, take some time to observe
 - There may be many systems, processes, procedures, etc. that you want to change or implement
 - Take your time before rushing into change
 - Build the trust of your staff and make sure you understand the current processes
 - Once you have gathered data, prioritize what you would like to accomplish and take one step at a time

INTRODUCING CHANGE

- Often, current staff is comfortable with the current process.
- They have always done it that way
- Don't criticize their methods, show them the potential advantages of implementing your desired changes
 - Time saving, efficiency, cost saving, better customer service, etc.

EXAMPLES

- I truly enjoy improving processes and systems
- I love making my staff's job easier
- Every district I have worked, I have been able to make some improvements
- Not always the easiest route and often requires more time but worth it
- One advantage of working in different districts is getting new perspectives and ideas

SOUTH WINNESHIEK CSD

- First Steps
 - Started Small with time saving items
 - Taught staff how to import journal entries and complete bank recs on the system
 - Found many instances where we were doing double work or manual work
 - EFT payments for common vendors and employee reimbursements
 - SIMBLI for board meetings and policies
 - Implemented a new absence management and time keeping system
 - Implemented Papercut for printing and copying

SOUTH WINNESHIEK CSD- KEYS TO SUCCESSFUL CHANGE

- Never asked them to do it alone
- Always gave them the option to go back to the old way if they thought it was better
- I was very involved in the changes, start to finish
- We all learned new systems together so everyone has support within the office
- Took every change one step at a time and made sure everyone was comfortable

POSTVILE CSD

- First Steps
 - Started Small with time saving items
 - Online tax payment
 - Found many instances where we were doing double work or manual work
 - EFT payments for employee reimbursements
 - Online access to pay stubs, tax documents, and employee updates
 - Online access to leave balances

POSTVILLE CSD

- Other changes
 - Online time keeping system
 - Online registration with credit card payment options
 - District wide purchasing card procedures
 - Paperless document storing system
 - Online benefit enrollment
 - Paperless employment contracts

POSTVILLE CSD- KEYS TO SUCCESSFUL CHANGE

- Asked for feedback as to what changes staff would like to see
- Made one change at a time
- We also learned new systems together
- Open door policy for all – no frosted window
- Eliminated THE machine
- Chocolate!



EXAMPLES

- What have others done for cross training or transitions?
- We will show some examples if time allows

QUESTIONS?

Contact information

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