

The logo for Baird, featuring the word "BAIRD" in white, uppercase letters on a dark blue, parallelogram-shaped background.

Starter Kit for the New SBO

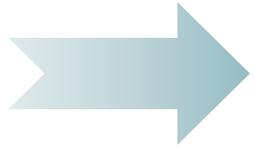
WASBO Fall Conference

October 6, 2023 – 10:10-11:00am

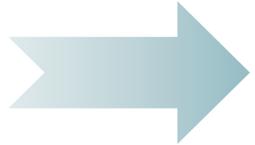
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Goals for Today's Presentation



At least **two** takeaways



Expand your network



Key Audience

New to the profession
within the last 5 years

Veterans looking for a
refresher



How can you effectively manage all of the responsibilities that come with your job?



Build Your Toolkit

- Organization
- Relationships
- Communication
- Leadership
- Strategic Budgeting





Get Organized

Get Organized

Review all policies related to finance

Review prior audit reports

Understand meeting expectations (schedule them for the year including topics at each)

Reconcile cash

Understand your grants

Create task calendar with who is responsible for; know what to do when

*Utilize the [DPI's Calendar and Due Dates](#) page and subscribe to the *School Finance Bulletin**

Prioritizing

Prioritizing a time and responsibilities is key to being successful

Keep a detailed calendar

Always ask questions when information or a meeting is requested

Put others' skills to work

Understand how you work best

"To don't" list

Prioritization – Balance Matters!

“You can’t truly be considered successful in your business life if your home life is in shambles” – Zig Ziglar





Relationship Building



PRODUCER
ANDY
ACKERMAN

TRAINING

LEARN

INSPIRE

PRACTICE

SEMINARS

WORKSHOPS

COACH

SKILLS

MENTOR

CAREER

SUCCESS

DEVELOP

METHOD

MOTIVATE

LEADERSHIP



Relationship Building

Internal:

- District staff
- Administrative team members
- Building staff



*The strength of the team is each individual member.
The strength of each member is the team.*
-Phil Jackson

Internal Relationship Building

Take the time to get to know the staff in your office

Consistent check-Ins

Understand each role

Empower your staff

Internal Relationship Building

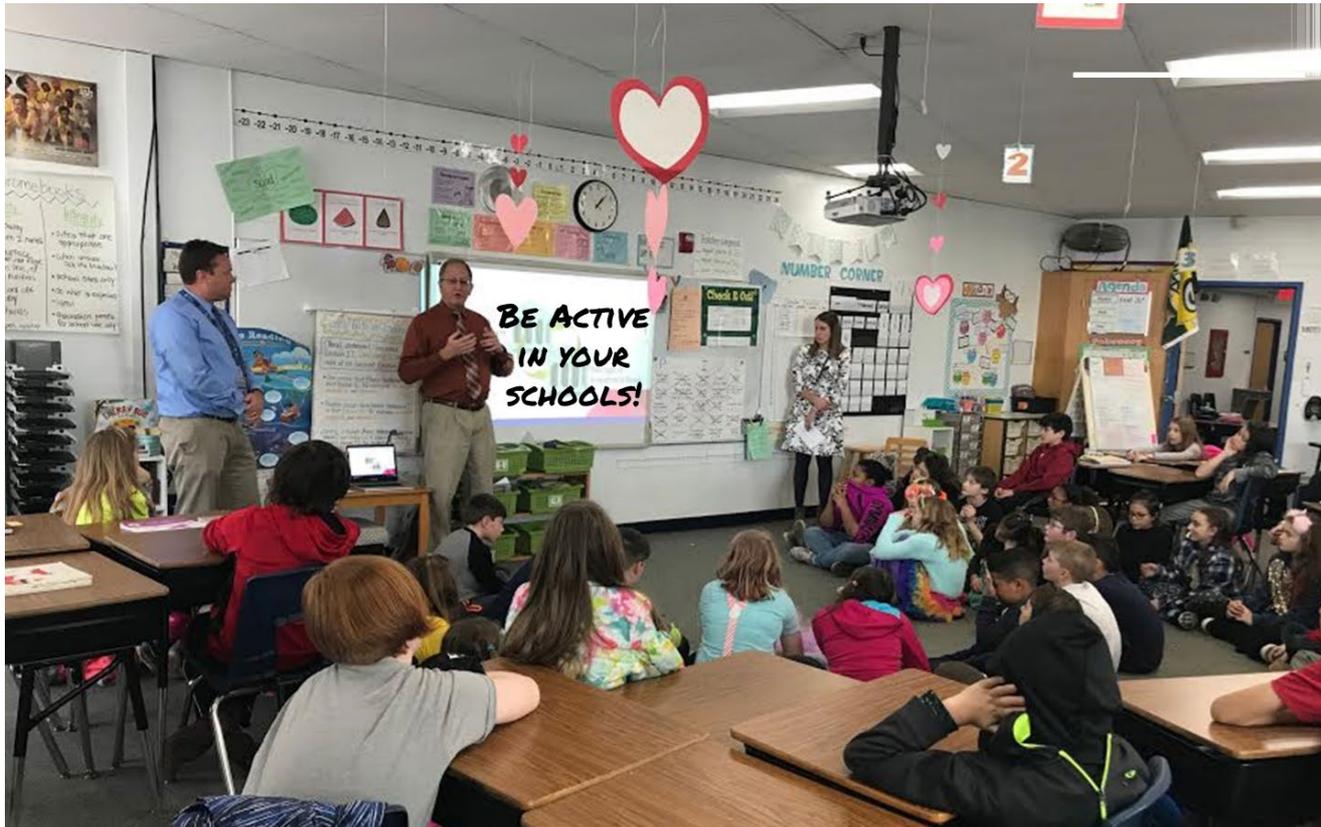
Your Fellow Administrators:

- Understand their roles
- Break down silos



Internal Relationship Building

Building Staff



The school/district doesn't work without EVERYONE

Relationship Building



External Relationship Building

Parents:

- Focus on customer service
- Do not back away from tough conversations
- Understand parents want what's best for their kids



External Relationship Building

Contracted Services:

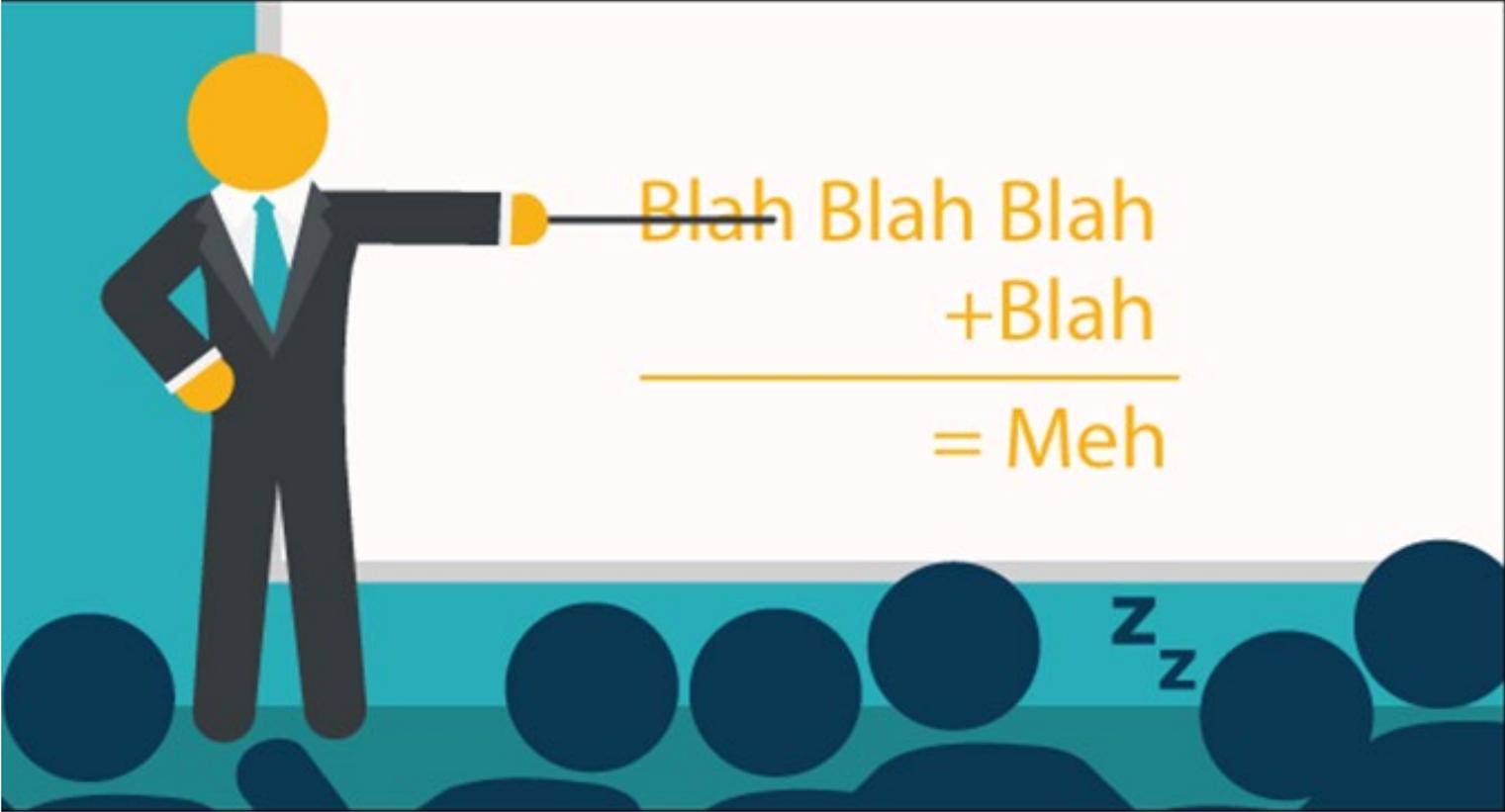
- Monthly meetings
- Get to know the staff
- Celebrate with them
 - Bus driver appreciation
 - School lunch heroes
- Maintain relationships with vendors you may not use





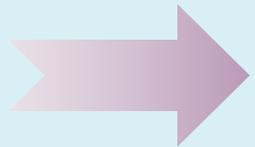
Communication

Communication



Why Are We Communicating?

- This is difficult and challenging stuff to understand
- People are affected by this
- People want to know or may not want to know, but they should know
- If you do not communicate it, people will write their own narratives



Most people trust their emotions over fact!

How Are We Communicating?

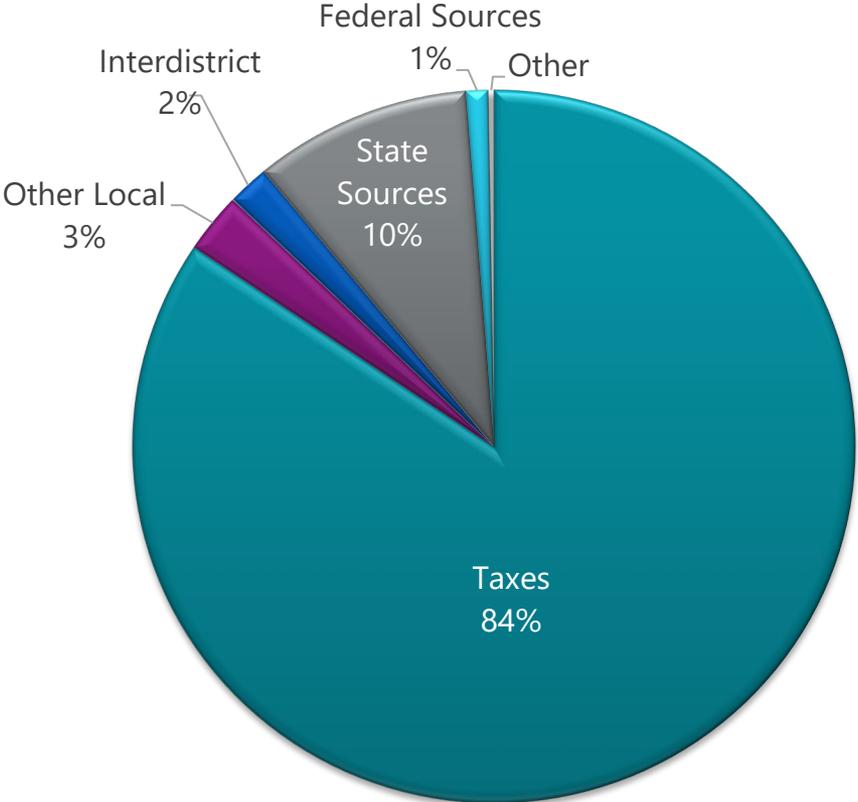
Staying focused on your "why"



How Are We Communicating?

CHOOSING THE RIGHT VISUAL

Fund 10 Budgeted Revenue 2022-2023



■ Taxes ■ Other Local ■ Interdistrict ■ State Sources ■ Federal Sources ■ Other



How Are We Communicating?

CHOOSING THE RIGHT VISUAL

VS.

Tax Levy Per Pupil

Year	Enrollment	Equalized Valuation	Tax Levy	% Change in Tax Levy	Tax Rate/ 1,000.00 Equalized	Tax Levy per Pupil
2010-11	3,624	4,484,326,853	40,335,694		8.99	11,130
2011-12	3,497	4,352,780,656	37,795,126	-6.30%	8.68	10,808
2012-13	3,472	4,214,016,365	37,561,497	-0.62%	8.91	10,818
2013-14	3,505	4,189,188,981	37,579,163	0.05%	8.97	10,722
2014-15	3,492	4,369,760,180	37,296,669	-0.75%	8.54	10,681
2015-16	3,595	4,590,312,133	37,713,405	1.12%	8.22	10,491
2016-17	3,575	4,688,782,986	38,228,889	1.37%	8.15	10,693
2017-18	3,582	4,819,164,477	38,874,953	1.69%	8.07	10,853
2018-19	3,644	5,053,764,387	39,034,172	0.41%	7.72	10,712
2019-20	3,639	5,269,340,958	40,480,740	1.72%	7.68	11,124
2020-21	3,478	5,420,583,547	43,125,789	6.53%	7.96	12,400
2021-22	3,439	5,528,995,218	43,701,386	1.33%	7.90	12,708



More ≠ Better

Additional Considerations

Relax and listen

Make sure you understand the question - repeat it back

Put answer in terms the audience will understand

- Consider using an example

Know when to stop talking

If you don't know, say so

- Find the answer and follow up



Leadership

Leadership in the Business Office

Create a leadership philosophy

What does leadership mean to you?

How will you model it?

WASBO Leadership Academy

Leader vs. Manager

LEADER

Vision
Communication
Engagement
Risk taking

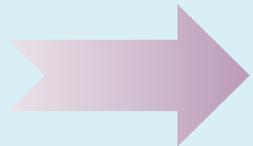
MANAGER

Organizing
Coordinating
Commanding
Measuring

What is a core value? Basic beliefs or fundamental principles?

Two tests to determine if a value is a core value:

1. Would you hold this value even if you were penalized for doing so?
2. Is this value still likely to be core for you 20 years from now?



If the answer is "yes" to both questions, the value is a core value!

Leadership Philosophy

This is what leadership means to me:

Leadership is having the courage to do the right thing and build trust in others to move the organization forward. In order to promote continuous improvement, I must lead by example recognizing that my leadership is defined by my actions.

This is how I model it:

My Value	What It Means
Family	Work-life balance, realizing how my professional decisions impact my personal life
Honesty	Acting truthfully and morally, telling the truth despite the consequence
Respect	Treat people well, give praise often, and give credit when due



Getting Involved

ASBO
WASBO
WASBO Regionals
Build your own!

**Make professional
development a priority!**

Apply for an ASBO Scholarship!





Strategic Budgeting

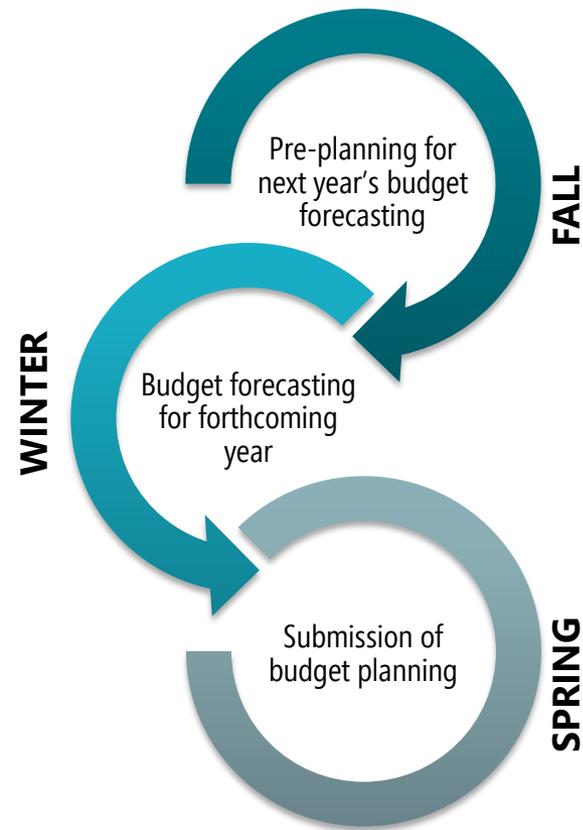
Strategic Budgeting

- Compare your budget to the prior year
- “Right-size” your budget
- Look at the typical high-spend areas
- Compare your data to other districts

Building and monitoring your budget is most likely the most important thing you will do in your position!



Have a Plan

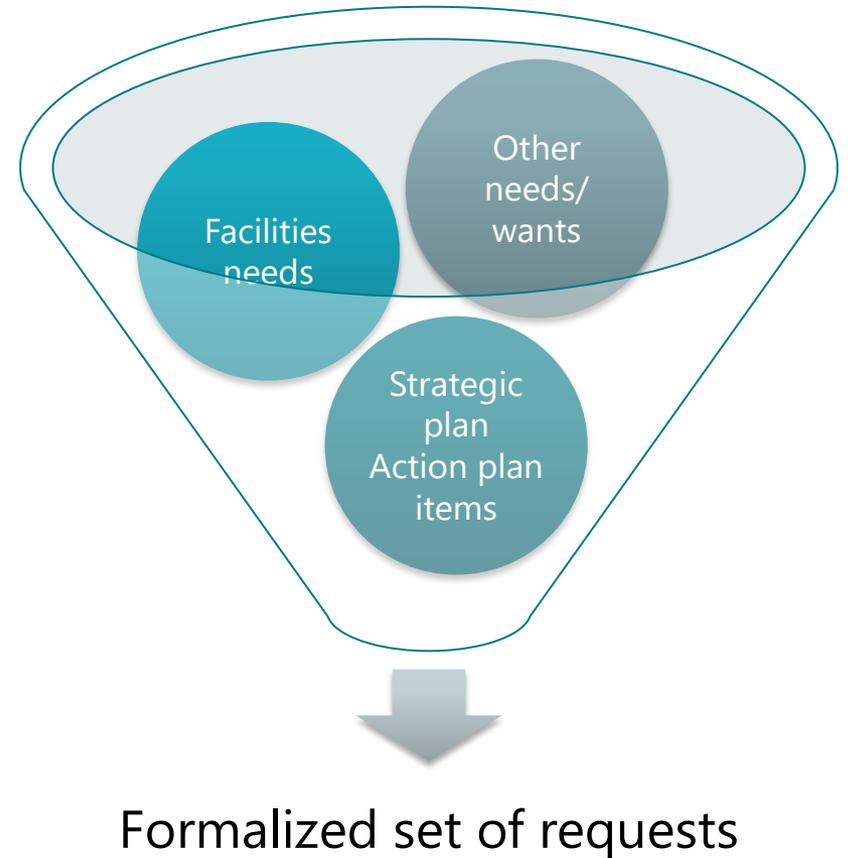


Month	Activity
November	<ul style="list-style-type: none">Finalize new course/curriculum proposalsAssess budget forecast/enrollment projections/review of staffing/analysis of class size/FTEs/department needs
December	<ul style="list-style-type: none">Discussions w/ principals/departments (class size, staffing, program needs)Process to evaluate requests
January	<ul style="list-style-type: none">Building/department budgets due
February	<ul style="list-style-type: none">Presentations of new initiatives/facility projects
March	<ul style="list-style-type: none">Board action on recommended new initiative/facility projects

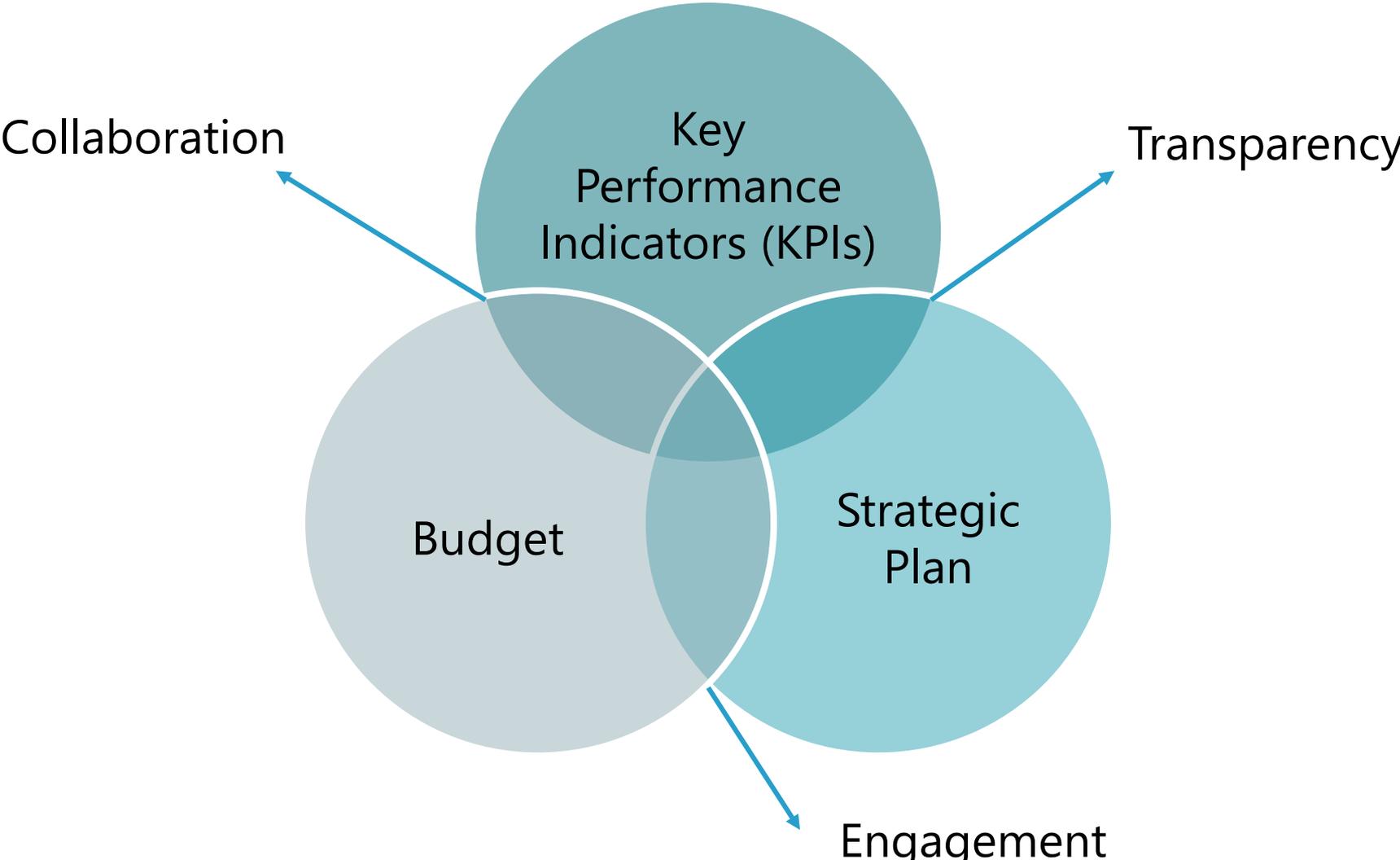
Have a Process

"If you can't describe what you are doing as a process, you don't know what you're doing."

- W. Edwards Deming



Strategic Budgeting



Strategic Budgeting



"Looking at the goal area you support, how much does each tactic cost?"

"Can your budget support it?"



"How does each tactic rate against other items within your district budget?"

"What problem are we trying to solve?"



"How does the budget request support our strategic plan?"

"What Key Performance Indicator benefits from the budget request?"

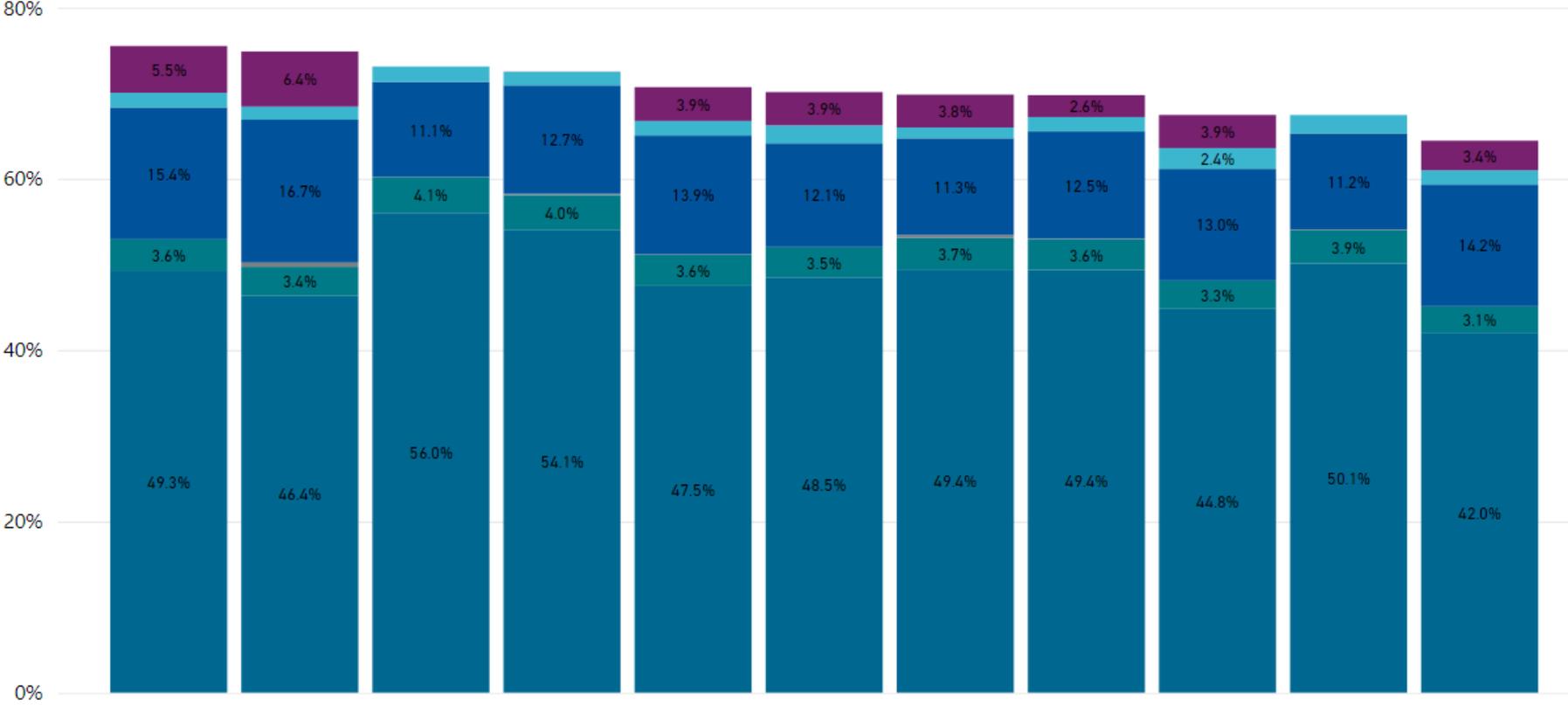
Budget Benchmarking



Strategic Budget Using Benchmarking Data

Fund 10 & 27 Total Spending by Object as a % of Total Expenditures

Object Category ● SALARIES ● SOCIAL SECURITY ● LIFE INSURANCE ● HEALTH INSURANCE ● UTILITIES ● PUPIL TRANSPORTATION



Know Your Why!





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