



# OASBO Update: Northwest Ohio ESC

Jim Rowan, CAE, Executive Director

Ohio Association of  
School Business Officials

August 4, 2023

# Our New Mission

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## Old:

An association of Ohio  
school business officials  
empowering members by  
providing advocacy,  
collaboration, and innovative  
education.

## New:

Empowering Ohio's  
public school finance and  
operations professionals  
to achieve excellence through  
**collaboration, continuous  
learning, and advocacy.**

# Our New Vision

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## Old:

OASBO and its members are  
the leading experts in  
school finance and operations  
resulting in efficient and  
effective schools.

## New:

Fostering financial  
and operational excellence  
to advance Ohio  
public education.

# Updated Constitution & Bylaws





# Updates

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1. Language clean-up to clarify and define terms used in the bylaws.
2. Reordering sections to put overarching portions first, followed by more detailed sections.
3. Removing redundancies and programs that no longer exist.
4. Clarifying membership types to reinforce the OASBO purpose and mission.



# Updates

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## **5. Created a new membership type: Auxiliary Membership**

Open to those who:

- Hold treasurer or business manager license in Ohio but not currently employed in a school district.
- Work in higher ed positions related to school business administration
- State agency and other public institution employees in Ohio that are directly concerned with the business operations of Ohio public schools; and

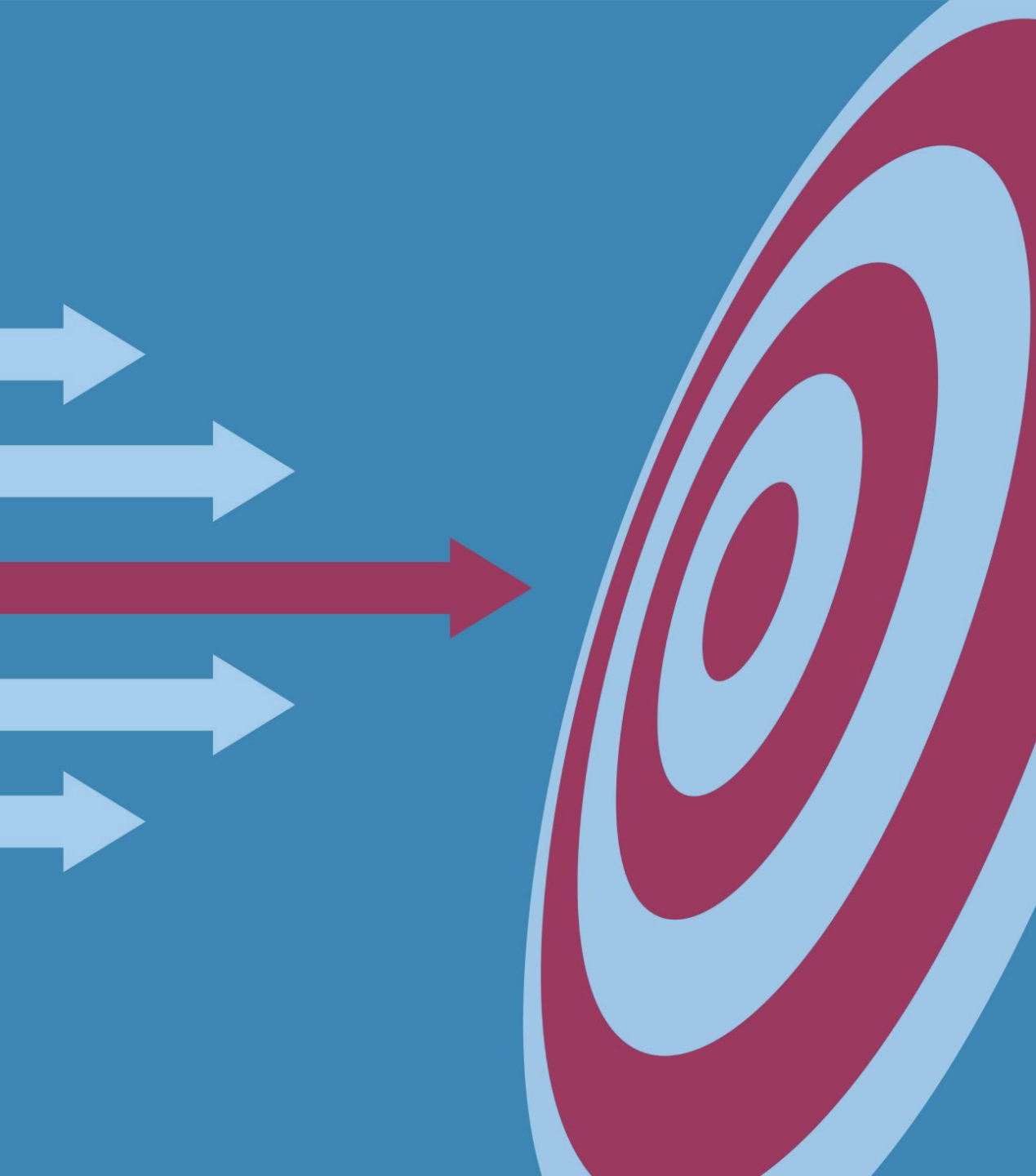
**Associate Membership type clarified as:**

- For those employed in the business affairs of school districts in Ohio, including support staff for school district business and fiscal operations

# Updates

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6. Clarified that you must be employed in a school district to serve on the Board of Directors.
7. Changes made at the recommendation of the nominating committee:
  - a. Added that no Regional Director or At-Large Director shall be elected to consecutive three-year terms, unless notified by the President that there are no applicants for such position.
  - b. Added that an individual must serve one two-year term as secretary/treasurer or one three-year term as a regional or at-large director to qualify for election as vice president.
8. Clarifications to the creation and leadership of OASBO committees.



# Strategic Plan Goals



# Strategic Plan - Goals

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## **Advocacy – Be the Voice**

### ***Statement of Desired Achievement:***

Protect and support public education and the students we serve by communicating and engaging with superintendents, boards of education, district staff, community leaders, and policy makers at the local, state, and national levels.

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## **Career Development – Learning & Growth**

### ***Statement of Desired Achievement:***

Create opportunities for differentiated professional learning and growth for current and future public school business officials, and build their capacity to lead in their districts.

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# Strategic Plan - Goals

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## **Membership - Collaborate, Engage, Unite**

### ***Statement of Desired Achievement:***

Members will feel welcome, supported, and included in the association and empowered to actively collaborate, making the association and its members the trusted authority in all matters related to public school finance and business operations.

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## **School Business Profession - Recruitment**

### ***Statement of Desired Achievement:***

Develop a broader awareness of and drive interest in the public school business profession to increase the pool of qualified candidates.

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# Diversity, Equity & Inclusion Efforts

# Learning Journey



- Helping members understand what DEI means
- To educate and empower members to understand and implement the ideas around DEI
- What it might mean to members in the context of your work
- It comes down to culture and how we can all be **#bettertogether** when we have a greater understanding of DEI

# Chapter Visits

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- Daniel Juday travelled around the state to 6 chapters to discuss DEI
- Engaged members in conversation
- Continues to schedule visits in new FY for next step in our learning journey







# Ohio Professional Standards for School Treasurers and School Business Managers: Recommended Updates to Standards

# Background Information

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Current Ohio Standards for Treasurers and Business Managers adopted in 2010.



ASBO International updated their Standards for School Business Officials in 2021.

*(Todd Puster served on the ASBO Intl update task force.)*



OASBO initiated a comprehensive review of Ohio Standards & informed ODE. It was the first full review since adoption.

# Ohio & Intl S

2021 EDITION

## International School Business Management Professional Standards and Code of Ethics

OH  
Standards



ASSOCIATION OF  
SCHOOL BUSINESS OFFICIALS  
INTERNATIONAL

s Managers



# Timeline & Progression on Updates



# Workgroup Members

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★ Business Mgr license  
★ Treasurer license

**Yenetta Harper**

Office of Educator Effectiveness, ODE,  
Educator Standards Board Director

**Kristen Blazsik**

Office of Educator Effectiveness, ODE, ODE  
Support

★ ★ **Chris Passarge**

Lakota Local Schools, OASBO rep

**Abbey Bolton**

Kent City Schools, Educator Standards  
Board Member, OAESA rep

**Karen Boch**

Gallia Vinton ESC, Educator Standards  
Board Member

**Rosalind Moore**

East Cleveland City Schools, Educator  
Standards Board Member, OSBA rep

★ **Amy Gioffredo, Chair**

Amherst EVSD, Educator Standards Board,  
OASBO rep, Workgroup Chair

★ **Todd Puster**

Orange City Schools, OASBO rep

★ ★ **Jennifer Sudhoff**

Benjamin Logan Schools, OASBO rep

**Kim Laugherty**

OASBO, Workgroup Facilitator



# Standards Assessment

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- Workgroup reviewed Ohio standards and compared to the updated ASBO International Standards to analyze alignment in all areas.
- Sought to determine if the current Ohio standards were still relevant and applicable to the role of school treasurers and school business managers in today's school environment.

# Assessment Outcomes

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- Current Ohio standards fared well since 2010, but updates needed to account for changes in business practices and terminology.
- ASBO International and Ohio standards had alignment in the core elements and indicators.
- ASBO International standards is formatted differently than Ohio standards
  - Ohio standards serve as a guide to professional performance and the ASBO standards provide a pathway for career-long professional development.
  - Decision made to leave Ohio standards format as is.

# Main Areas of Focus for Proposed Updates

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Ensure both the Business Manager & Treasurer standards reflect that their roles are ultimately to support teaching and learning.

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To place a greater emphasis on transparency in finance and operations.

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To consider cyber issues as it relates to risk management.

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Modernize roles, responsibilities and language associated with performing the duties of school treasurers and school business managers where needed

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To modernize overall language.

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# Feedback from the Field

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- With the addition of the word “transparency,” how can this be demonstrated and evaluated?
- Addition of cyber-related responsibilities/language proposed was too narrow & this area is joint responsibility.
- With addition of “continuous leadership development,” is this an overly burdensome requirement?
- Minor rewording edits suggested and incorporated
- Incorporate the support of extracurricular and co-curricular activities
- Incorporate the support provided to core teaching and learning

# Open for comments through July 31

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Professional Standards for  
Treasurers and Business Managers -  
Feedback Form







# **Have You Taken Advantage of Your Expanded Membership Benefits?**

# Fiscal Year '24 Benefits

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- **2 Associate Memberships** included with every Professional Membership
  - **Like your ESSER funds and other COVID-related benefits, the 2 Associate Memberships ends this year – please take advantage!**
- **Associate Membership fee remain \$50**
- **Student Membership fee remains \$0**

***And.....***

# Additional Member Benefits

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These events are included with all membership types:

- **Webinars:** Monthly topics & \*Quarterly Leadership
- **Seminars:**
  - Student Activities/Booster Groups
  - Grants Management
  - EMIS
  - Business Operations Hot Topics and Regional Training Day



# **Professional Learning: Upcoming Events & New Offerings**

# Leadership Institute – Apps due by 8/18

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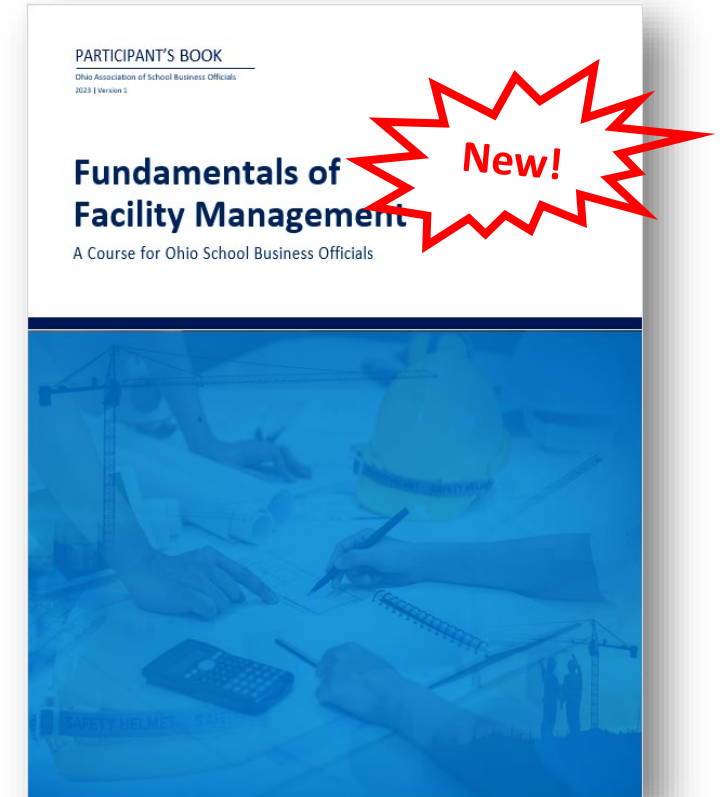


- Five 2-day sessions (Nov. 7 – Mar 13)
- Sessions will include interactive group work and activities
- Group assignments between sessions
- Program limited to 30 participants



# Fundamentals of Facility Management – August 30 – 31 (*hybrid*)

- Master Facilities Plans
- Construction Projects, Methods
- Budgeting & Utility Mgt
- Risk Mgt/Safety
- Maintenance & Work Order Systems
- Custodial Staffing, Cleaning, Chemicals
- HR role in facilities
- Community Use, Scheduling Systems, Cost Recovery
- Evaluating your Facility Maintenance Program



[Register here!](#)

# Leadership Conference – Sept 20 – 22

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*Sawmill Creek Resort*



## The Battle of Lake Erie:

- Leadership styles and their importance in leading an organization.
- Concepts of adapt, innovate, and overcome effectively in an organization.
- Discussions around strategic leadership, strategic vision, innovation, etc.

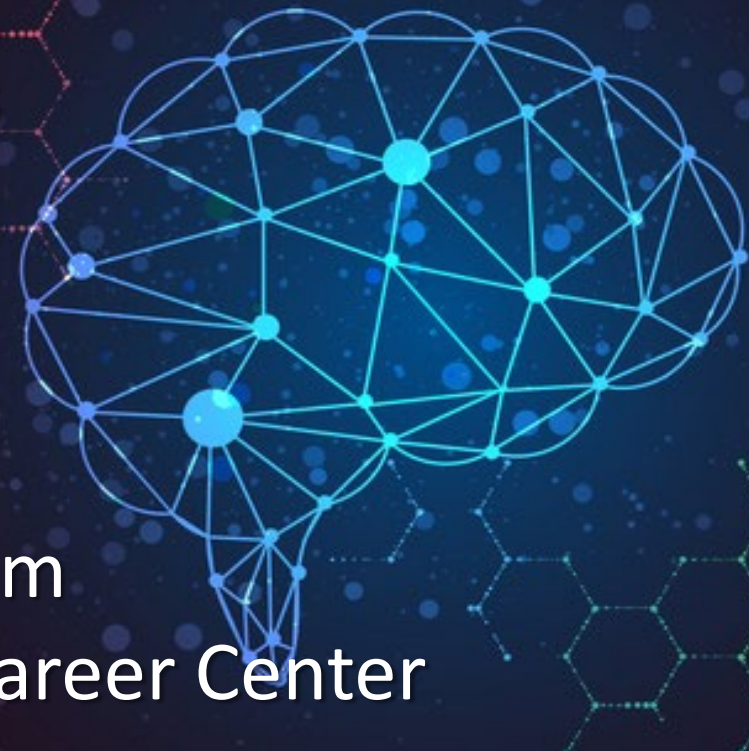
[Register here!](#)

# Public Schools Cyber Symposium – Sept 26

*Attend in person or live stream. In partnership with BASA and OSBA.*

This event will examine:

- Artificial Intelligence Opportunities and Challenges
- Cyber threats & trends, cyber crisis management
- Cyber Attack – Lessons Learned from Toledo Public Schools and Apollo Career Center





# SupportCon – Oct 26 – 27, *Hilton Easton*



- ✓ 2 days of education
- ✓ 2 keynotes
- ✓ EduTalk Lunch Sessions
- ✓ Software learning labs!

[Register here!](#)



# Annual Conf & Expo – Apr 16-19, 2024

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*Registration opens in January 2024*

# In Development:

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- Fundamentals of Payroll – coming FY25



# We Need You: Quick Learn Sessions

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- 15 to 30-minute webinars
- Variety of topics benefiting school business officials
- All members are welcome & encouraged to submit a presentation
- [Learn more and download the template](#)



# Get Involved!

# Join Student Career Outreach Program

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We're seeking volunteers to join in outreach efforts to Ohio college and university students about SBO professions!

[Click here](#) or scan this code to sign up!





Ohio  
Association  
of School  
Business  
Officials

# Become a Public School Business Professional



Welcome to the world of school business, where financial management and operational excellence are part of the job! If you're looking for a career path that combines your passion for education and business, this might just be the right opportunity for you. Start your journey today and become a valued member of a dynamic and rewarding profession!

Careers Featuring



# Who are School Business Professionals?

School business professionals bring diverse educational and career backgrounds to the table. Some start from an operations or finance support position in a district and work their way up to become a business manager or treasurer over a period of years. Others join directly from public or private industries, possessing relevant experience tailor-made for the job.

Interestingly, there's no college degree specifically for school business management or finance. However, business and finance degrees, coupled with hands-on job-specific training from licensure associations like OASBO, prepare aspiring school business professionals for a flourishing career.



## Current School District Employees

Teachers, educational administrators, and those currently in the business or finance office of a school district are well-positioned to make the move towards becoming a treasurer or business manager. Hear from current school business professionals who worked their way up in a school district.

[Learn More](#)

## Career Changers

Professionals in various finance and operations careers have many transferable skills and can find success in a school business career. Hear from professionals who made the switch.





[Learn More](#)


## College/University Students


Now is a great time to set your sights on a career in school finance or operations. Hear from those who prepared for and entered the school business profession right out of college.

[Learn More](#)

# Join a Committee or a Chapter

[collaborate](#) [eLearning](#) [Advocacy](#) [Log In/Create Account](#)

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[AFFILIATES, CHAPTERS, & COMMITTEES](#)

### Overview

### Regional Chapter & Committee Map

### Affiliates & Local Chapters/Committees

STATEWIDE

Career Tech Treasurers Committee

ESC Treasurers

Food & Nutrition Chapter

Transportation - OAPT

CENTRAL REGION

Central Chapter

NORTHEAST REGION

East Central Committee

Five County Chapter

Northeast Chapter

Western Reserve Chapter

### Committees

Sign-Up for a Committee

Annual Workshop Special Events Sub-Committee

Annual Workshop Track Sessions Sub-Committee

ASBO International Committee

Audit Committee

Auditor of State Committee

Business Operations Advisory Committee

Diversity, Equity, & Inclusion

Editorial Advisory Committee

Education Finance Committee/ODE Advisory Committee

Legislative Committee


Licensure Committee

Local Professional Development Committee

Nominating Committee

Professional Development Committee

Website/Technology Advisory Committee



Empowering Ohio's public school finance & operations professionals to achieve excellence through collaboration, continuous learning, and advocacy.

### Join us at the 2023 Leadership Conference!

Sept. 20-22 at Sawmill Creek

### Upcoming Webinars

### Legislative Committee

Important Notice: Legislative Committee Members Announced >

Senate Finance Committee Accepts Omnibus Amendment



# Plan, Facilitate, and/or Present at Events

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# Write an article or contribute to *collaborate*

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- *SBO Quarterly*
- *eNews*
- *collaborate*

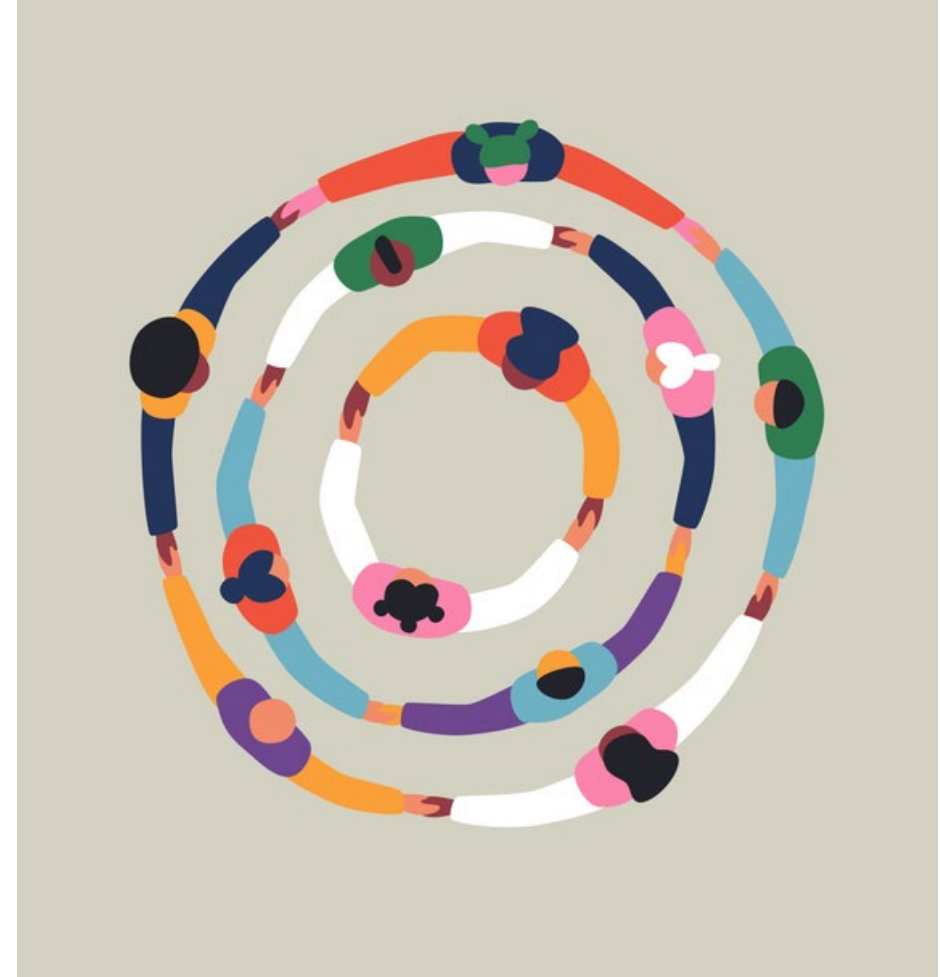


# Be a Mentor

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- Over 40 new treasurers entering profession each year
- Many new business managers/directors of operation entering the profession
- Scholarships granted to mentors

[Click here to apply.](#)



# Member Spotlights!

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OASBO is looking for nominations for our regular member spotlights!

If you have a colleague you think deserves special recognition, please submit a nomination form!



[Click here to submit a nomination](#)

# Advocate

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**The  
Hearts & Souls  
Project**



**Empowering Ohio's public school  
finance and operations professionals  
to achieve excellence through  
collaboration, continuous learning,  
and advocacy.**



# Questions?

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