



**The Superintendent's Guide**

**TO HIRING,  
SUPPORTING  
AND DEVELOPING  
YOUR CHIEF  
BUSINESS  
OFFICIAL**

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# The CBO: An Indispensable Strategic Partner

Chief Business Officials (CBOs) are **multifaceted leaders** who do far more than balance the budget. They serve as a critical member of your district's executive team, partnering with you to navigate the complex operational and financial challenges of running a school district. In today's climate of heightened accountability, mandates and limited resources, a competent CBO enables the superintendent to focus on educational leadership, while ensuring the **district's finances and operations are in expert hands**.

## More than Just School Finance

A CBO's knowledge and influence extend well beyond budgeting. In fact, effective CBOs act as partners in every facet of a Local Education Agency's (LEA) planning and operations. They bring a long-range vision and strategic thinking that complement the superintendent's educational focus. You can rely on your CBO to "make the complicated understandable" for your board and community – translating financial data into clear implications and guiding long-term decision-making.

**The scope and complexity of a CBO's responsibilities vary based on the size and structure of the LEA.** In smaller LEAs, the CBO may wear multiple hats, overseeing nearly all non-instructional operations, while in larger or more complex LEAs — especially those with charter schools — the role may involve managing large teams and advanced financial systems, and providing significant oversight. Regardless of LEA size, a certified Chief Business Official is expected to be proficient in a wide array of operational areas, including:

- **Budgeting and Financial Reporting:** Developing and managing the LEA's budget, preparing financial reports and audits, ensuring transparency and accountability for every dollar.
- **Cash Management:** Overseeing cash flow, banking relationships and fund balance planning to ensure fiscal stability.
- **Long-Range Financial Planning:** Projecting enrollment and funding, performing multiyear financial forecasts and planning for sustainable funding of programs and facilities.
- **Procurement and Contracts:** Overseeing purchasing, bidding and vendor contracts in accordance with state and federal requirements.
- **Technology Infrastructure:** Collaborating with IT leadership to align fiscal systems and operational priorities with the LEA's technology strategy.

- **Transportation Services:** Overseeing routing, fleet management, compliance and vendor oversight for student transportation.
- **Nutritional Services:** Ensuring program compliance, fiscal accountability and equitable access to student nutrition programs.
- **Support in Collective Bargaining:** Providing critical fiscal analysis and strategic advice to the superintendent during labor negotiations.
- **Promoting Safe Learning Environments:** Managing risk mitigation, insurance, safety protocols and emergency preparedness plans.
- **Facilities Operations and Construction:** Managing maintenance and operations, capital improvement and new construction projects.
- **Human Resources Support:** Overseeing payroll and business office HR functions.

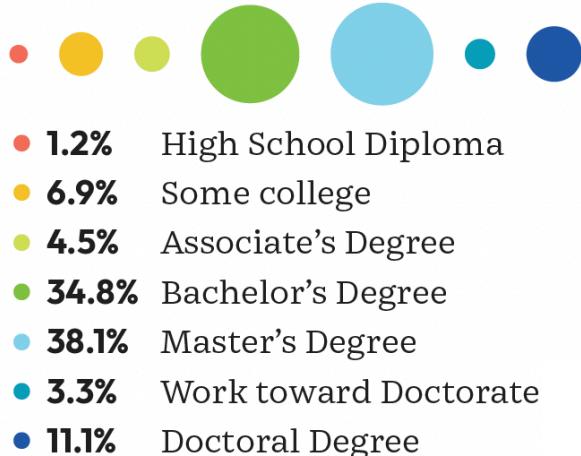
In short, **a high-performing CBO wears many hats** in the district. Beyond “putting out fires” day-to-day, they contribute to instructional quality by securing resources and efficiencies. They also shoulder accountability (alongside the superintendent and board) to the community that every education dollar is well spent. Hiring the right person for this role is one of the best investments a superintendent can make.

**“** As superintendent, trust is everything for my executive team. Our CBO doesn't just manage the business side of things; she is an integral partner in the work of leading the district.

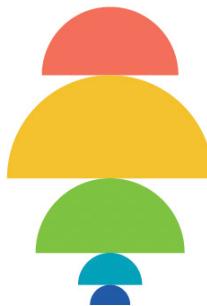
David Feliciano, Superintendent, La Mesa-Spring Valley Schools

# Resume of a Chief Business Official\*

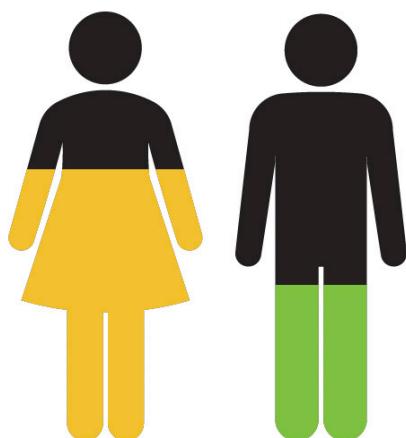
## HIGHEST LEVEL OF COMPLETED EDUCATION



## MAJOR AT HIGHEST LEVEL OF EDUCATION



## GENDER



- Female: 63.5%
- Male: 36.5%

## OTHER POSITIONS HELD IN EDUCATION BEFORE BECOMING A CBO



- Teacher: 19.6%
- Principal: 14.5%
- Director (of another division): 38.2%
- Superintendent: 4.3%
- Non-director Staff in another division: 13.7%
- Non-director Staff in Business department: 39.5%
- Other: 23.1%
- None of the Above: 11.5%

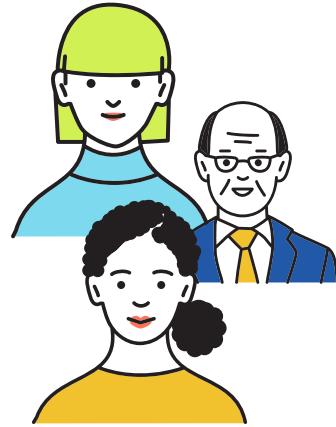
\*CASBO Value of Certification Study

## RACE/ETHNICITY

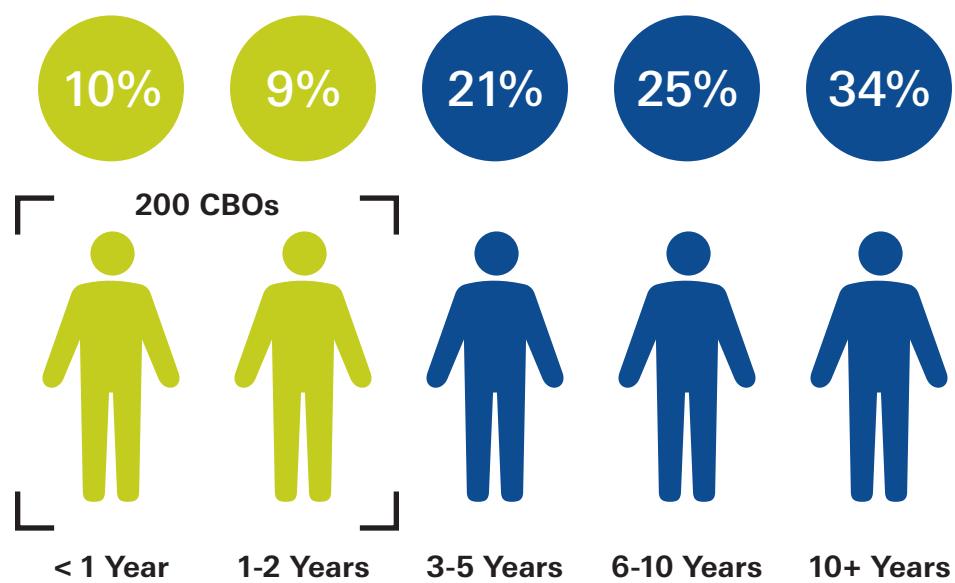
More ethnically and racially diverse since 1998 but not in line with student and statewide representation.



- **0.2%** American Indian or Alaska Native
- **8.9%** Asian or Pacific Islander
- **2.9%** Black or African American
- **19.1%** Hispanic or Latino
- **7.0%** Multiple Races
- **61.7%** White



## YEARS OF EXPERIENCE



# Recruiting and Selecting a CBO: A Six-Step Process

Bringing on a Chief Business Official requires thoughtful planning and a structured approach. The following six steps will help you recruit and hire a CBO who is the **right fit for your district's needs and culture**. Each step includes practical tools – from checklists to sample criteria – that you can use immediately in your hiring process.

## STEP 1

### Determine The Role and Scope of Your CBO: “What Do We Want Our CBO to Do?”

First, **define the exact responsibilities and leadership scope** you expect from your CBO. Every district is different; some superintendents seek a purely finance-focused business manager, while others need an operational leader who oversees multiple departments. Clarifying this up front will guide all later steps, from the title and salary you offer to the candidate qualifications you target.

*Note: In smaller districts, CBOs often wear multiple hats (e.g. handling HR or technology), whereas larger districts may have separate directors for some functions. Deciding which hats your CBO will wear is crucial in shaping the job.*

By completing a thorough checklist, you'll have a clear picture of the role's scope, including whether it's primarily fiscal management or a broader Chief Operating Officer-type function. This clarity will inform next steps, ensuring you recruit a candidate with the right skill set.

## CBO Task & Function Checklist

Start by listing the major tasks, functions and departments that could fall under your CBO's oversight. On the following page is a checklist you can adapt for your use. Check off the duties your new CBO will handle in your LEA.

# CBO Checklist

Function/Task	Performs Specific Tasks	Directs, Oversees or Supervises	Key Decision-Maker or Evaluator
<b>Budget Development and Management:</b> Lead the annual budget process, multiyear financial projections and ongoing budget monitoring.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Reporting and Audits:</b> Prepare monthly/quarterly financial reports for the board; prepare annual financial statements; oversee the annual audit and implement corrective action as needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Accounting, Cash Management and Investments:</b> Supervise accounting staff, AP/AR, payroll, cash flow and investments; maintain internal controls.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Debt Service and Capital Fund Management:</b> Oversee debt issuance, payment schedules and capital project fund tracking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cost Analysis and Forecasting:</b> Conduct cost-benefit analysis for operational decisions; support long-term planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Procurement and Contracts:</b> Oversee purchasing processes, bidding and vendor contracts; ensure compliance with codes and board policies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Facilities Operations and Construction:</b> Manage maintenance and operations, capital improvements and new construction projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Transportation Services:</b> Administer student transportation, route planning, fleet maintenance and budgeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Nutritional Services:</b> Oversee school nutrition programs, staffing, compliance and food service budgets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Risk Management and Safety:</b> Manage insurance claims, emergency preparedness and risk-mitigation strategies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Human Resources Support:</b> Oversee payroll and business office HR functions (e.g., benefits admin).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Collective Bargaining Support:</b> Provide financial analysis during negotiations and cost projections for labor agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Policy, Reporting and Compliance:</b> Ensure compliance with the Local Control Funding Formula (LCFF), education code and federal requirements; maintain updated financial policies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Strategic Planning:</b> Align operational strategy with instructional goals; support multiyear LEA planning efforts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cabinet-Level Leadership:</b> Advise superintendent on financial and operational matters; serve on cabinet and attend board meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Legal and Policy Management:</b> Ensure operational compliance with applicable laws; collaborate with legal counsel as needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Community Relations:</b> Support transparency and communication of financial decisions and status to the public and stakeholder groups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Board Policy and Brown Act Compliance:</b> Collaborate with the superintendent to develop board policies and ensure compliance with public meeting laws.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other:</b> _____ (Add other unique responsibilities, such as charter oversight or IT systems leadership.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Effective CBO Leadership Competencies

Beyond technical expertise, CBOs must demonstrate advanced leadership competencies to guide the LEA through complex financial and operational challenges. CBOs are expected to lead cross-functional teams, influence executive decision-making and cultivate a high-performing business services environment that supports student success.

Key leadership skills include:

- **Strategic Thinking:** Ability to anticipate trends, align resources with long-term goals and provide data-informed insights to drive strategic planning.
- **Critical Thinking and Problem-Solving:** Navigate complex scenarios, assess risk and identify innovative solutions to fiscal and operational challenges.
- **Performance Management:** Set clear goals, measure outcomes and use accountability systems to drive results across departments.
- **Staff Development:** Mentor and develop employees, foster a culture of learning and build succession within the business office.
- **Collaborative Leadership:** Work across departments and with external partners, including labor groups, auditors and charter schools, with diplomacy and transparency.
- **Communication and Influence:** Translate complex financial data into accessible language for the board, superintendent, staff and community; advocate for operational priorities.
- **Systems Thinking:** Understand how business operations intersect with instruction, equity, compliance and long-term sustainability.

**“** The success of our schools depends on great teaching and the careful stewardship of resources, and my partnership with our CBO is essential to ensuring our students thrive.

Tim Stowe, Superintendent of Schools, Torrance Unified School District

## STEP 2

# Determine the Title, Qualifications and Salary Range

With the role defined, **align the position's title and compensation to match responsibilities**. In education administration, a job title often signals the level of authority and pay. For example, a district seeking a cabinet-level leader might use "Assistant Superintendent for Business," whereas a smaller district might hire a "Director of Finance/Operations." Choose a title that fits your district's hierarchy and the complexity of the role.

### Common CBO Titles (and Variations):

- **Assistant Superintendent for Business or Business Services/Operations:** Implies a top-tier cabinet position, often overseeing finance plus additional departments (facilities, HR, etc.).
- **Chief Business Official (CBO) or Chief Financial Officer (CFO):** Typically cabinet-level and focused on finance, though scope can vary by district.
- **Director of Business Services/Finance:** Often used in small to midsize districts; may indicate a narrow focus on business office functions, reporting to the superintendent.

**Qualifications and Credentials.** Define the minimum qualifications that reflect the title and duties. Most CBO positions will require:

- **A bachelor's degree in business, finance, accounting or a related field** (master's degree preferred for higher-level titles).
- **Relevant experience** in school or public sector finance (e.g. 3-5 years for a manager, 5-10+ years for an assistant superintendent).
- For higher-level roles, **school business certification** is often desired. (*In California while there isn't a state-issued "Chief Business Official" license as in some states, having a CASBO CBO Certification or an administrative services credential is a plus.*)
- **Key skills** such as budgeting, governmental accounting, knowledge of California school finance laws (LCFF, etc.), leadership and communication abilities, and familiarity with areas like facilities and HR if those are in the scope.

**Setting a Salary Range:** Research comparable districts and use available data to set a competitive salary range that reflects the expertise you expect. The salary not only needs to attract qualified talent but should also correspond to the title's level. For example, an Assistant Superintendent title will command a higher range than a Director role.

In addition to base salary, consider **benefits and perks** that might be negotiated, such as car allowances or stipends for advanced degrees. Decide what your district can offer up front so you have flexibility during negotiations.

It's also important to **establish a reporting relationship**. CBOs should report to the superintendent, not a deputy or other party.

Finally, ensure your job description (created in Step 3) clearly reflects qualifications and duties so candidates understand the expectations. Being transparent about the role's scope and compensation will attract candidates who are suited to the role.

## STEP 3

# Create a Clear, Customized Job Description

Armed with a defined role, title and pay range, the next step is crafting the job description. A well-written job description will be both **comprehensive and tailored** to your district, serving as the blueprint for your recruitment and later evaluation.

Key components to include in the CBO job description:

- **Position Title and Role Summary:** For example: "Chief Business Official – Responsible for overall financial leadership and operational support of the district." Include who the position reports to (usually the superintendent) and whether they are part of the executive cabinet.
- **Duties and Responsibilities:** List the major duties, ideally grouped by area (Finance, Operations, Leadership, etc.). Use the items you checked in the **Task Checklist** in Step 1 to populate this section. For example: "Budgeting and Financial Planning – Develop annual district budget and multiyear forecasts, and advise board on the fiscal implications of policy decisions; Facilities Management – Supervise Director of Maintenance, oversee capital projects and facility use," and so on. Be specific enough to give a clear picture but avoid overly minor tasks (daily minutiae can be covered by "performs other duties as assigned").
- **Required and Preferred Qualifications:** As determined in Step 2 – For example: "*Bachelor's degree (master's preferred) in finance, accounting, business or related field; minimum 5 years of progressively responsible experience in school or public sector finance; knowledge of California school finance (LCFF, LCAP, ed code, etc.); strong leadership, communication and interpersonal skills.*" If you expect the person to hold certain certifications (CPA, School Finance and Operations certification or CASBO CBO Certification), list those as preferred. Also include standard requirements such as a valid California driver's license.

- **Key Competencies or Attributes:** It's helpful to list a few core competencies or soft skills necessary for success, such as "*strategic thinker, ethical steward of public funds, collaborative team leader, adept at problem-solving under pressure, ability to communicate complex financial concepts to nonfinancial audiences.*" This helps set the tone for the kind of leadership style you're seeking.
- **Work Year and Compensation:** State the length of the work year (CBOs are typically 12-month employees) and that salary will be **competitive or commensurate with experience within the posted range**. You might include that a comprehensive benefits package is offered.
- **Application Process Details:** Outline how candidates should apply (e.g. through your district HR portal or EdJoin), what materials to submit (cover letter, resume, references and perhaps a letter of interest) and the deadline. Also include an equal opportunity employer statement as required.

A precise job description not only guides applicants but will also be useful later for evaluation. In fact, your **evaluation criteria** should flow directly from the stated responsibilities and competencies in the job description, ensuring alignment between what you asked for and what you will assess in performance.

## STEP 4

# Find Qualified Candidates

Now it's time to spread the word and **attract a strong candidate pool**. You have two main avenues: an open recruitment (posting and advertising to find an external hire), and/or developing talent from within ("growing your own"). You can pursue both simultaneously.

### OPTION 1: BROAD RECRUITING AND ONLINE POSTING

Cast a wide net by posting the position on reputable education job boards and leveraging professional networks. Key resources for California CBO searches include:

- **CASBO Job Portal:** CASBO's site is a go-to hub for school business professionals seeking jobs in California. The listings are updated regularly and reach candidates who are already in the school business field. (CASBO is the premier professional association for school business management in California and the job board attracts high-quality applicants.)
- **School Services of California (SSC):** Offers executive search assistance for CBO roles. SSC can help identify and screen CBO candidates, especially for executive-level positions, and work with the Superintendent and board throughout the hiring process.

➤ **EdJoin (CA Education Job Bank):** The **EdJoin platform**, supported by the California County Superintendents and the Association of California School Administrators (ACSA), is a widely used education job portal in California. Posting your CBO vacancy on EdJoin targets a broad audience of education professionals in the state. It also allows you to search résumés of candidates who match your criteria.

Don't forget **local and personal networks**. Send the job notice to neighboring district superintendents (in case they have an internal candidate who is ready to move up), county offices of education and your own district's business staff (they may have interested contacts elsewhere).

## **OPTION 2: SPECIALIZED RECRUITMENT FIRM**

**Consider engaging a specialized recruitment firm** if the position is high-level or if you anticipate challenges in finding candidates. Firms like School Services of California and other executive search consultants have deep networks in the CBO community.

## **OPTION 3: "GROW YOUR OWN" CBO**

In areas where qualified CBOs are scarce or to promote continuity, some districts choose to **identify internal talent and train them up** for the CBO role. Perhaps you have a finance director, accountant or site-level leader on staff with potential to take on more. Investing in their development can yield a loyal CBO who is already familiar with your district.

➤ **CASBO Business Executive Leadership (BEL) Program:** Statewide, many LEAs have successfully developed future and current CBOs by enrolling promising staff in the **CASBO Business Executive Leadership** (BEL) Program. This unique program is delivered by experienced school business professionals, ensuring its direct relevance to the real-world challenges of working in public education. The BEL Program offers both blended and fully virtual learning options, making it accessible for sitting CBOs as well as those aspiring to the role. It is offered three times per year and is aligned to the research-based core competencies of a CBO. Participants benefit from a cohort-based experience taught by practitioners who understand the nuances of the work. Graduates of the CASBO BEL Program – and those who have successfully completed similar programs through the University of Southern California (USC) or the Fiscal Crisis & Management Assistance Team (FCMAT) – are eligible to sit for the CASBO Chief Business Official Certification Exam. Supporting an employee through this program is a strategic succession planning investment and can prepare them to step confidently into the CBO role.

➤ **FCMAT CBO Mentor Programs:** FCMAT offers respected programs to train the next generation of school business leaders, including the **CBO Mentor Program** and the Small Local Education Agency (LEA) CBO Mentor Program. The year-long CBO Mentor Program pairs each participant with an experienced mentor (an active or retired CBO) and includes intensive monthly instructional sessions on all facets of school business (finance, HR, facilities etc.). Participants practice real-world skills and build a network, all at no cost (apart from travel) because FCMAT underwrites the training. If you have an aspiring CBO in your ranks, encourage them to apply – the competitive selection ensures committed, high-quality graduates. Graduates of this program are also eligible to sit for the CASBO Chief Business Official Certification Exam.

- **USC's Rossier School of Education:** USC offers a unique opportunity for educational leaders and school business professionals to deepen their management expertise. The program is built around the professional standards established by the Association of School Business Officials International (ASBO) and aligned with CASBO's certification requirements. Participants gain a comprehensive understanding of the operational and fiscal challenges facing today's school business officials and develop practical, research-based strategies to address them. Graduates of this program are also eligible to sit for the CASBO Chief Business Official Certification Exam.
- **County Office of Education CBO Prep Programs:** Some county offices also have CBO prep programs for small districts. By "growing your own," you not only solve your vacancy with a known quantity, but you also contribute to the pipeline of qualified CBOs in California.

Whether recruiting externally or developing internally, remain mindful of fit. Beyond technical competence, a CBO must mesh with your district's culture and values. **Leadership style** is key. Do you need a change agent to overhaul processes or a steady hand to maintain stability? Look for clues in candidates' past work and references to gauge qualities like collaboration, innovation, integrity and communication skills.

*Tip: If you go the "grow your own" route, set up an interim plan. Consider appointing the individual as "Acting CBO" or have a retired CBO mentor them on contract while they train.*

By the end of Step 4, you should have a robust pool of applicants to screen or a clear candidate in mind (or both). Now it's time to evaluate candidates and make your choice.

## STEP 5

# Conducting Interviews and Selection

With candidates identified, the interview and selection process will help you pinpoint **which person is the best fit** for the role. A structured approach will ensure you gather the information needed to make a confident decision.

**Plan a Multistage Interview Process:** Given the importance of a CBO, consider more than one round of interviews and a mix of settings:

- **Initial Screening:** A first interview (in-person or via video) with a panel could include the Superintendent, a cabinet member or principal, and perhaps a board member or parent representative. At this stage, focus on general qualifications, communication ability and understanding of school finance basics.

- **Technical Exercise:** If feasible, incorporate a practical task in a second-round interview. For example, give finalists a scenario in advance (like a budget shortfall or bond measure plan) and ask them to present their approach or solution. This showcases their analytical skills and how they communicate complex information.
- **Meet-and-Greet:** For top finalists, you might arrange an informal meeting with key positions (cabinet team, business office staff) or a tour of the district. Observe how the candidates interact. A good rapport with the existing team is important for a smooth transition.

**Prepare a Set of Core Questions:** Develop interview questions that cover both technical know-how **and** leadership qualities. Tailor questions to explore the specific challenges and priorities of your district.

Examples include:

*Describe your experience with developing a school district budget under tight constraints. How did you align resources with instructional priorities?*

*What strategies would you use to communicate complex financial information to administrators, teachers or parents who don't have a finance background?*

*Tell us about a significant operational challenge you have managed (e.g. a major facilities issue, implementing new software, etc.). What did you do and what was the result?*

*How would you establish credibility and build trust as the new CBO in our community?*

It's also useful to include **behavioral questions** ("Tell me about a time when ... ") to hear how candidates have handled real situations, as well as scenarios relevant to California (like dealing with a sudden mid-year state budget cut or navigating LCFF/LCAP processes).

**Use a Rating Rubric:** To make the interviews as objective as possible, use a simple rubric for the panel to rate each candidate's responses/qualities (e.g. on a 1-5 scale for areas like financial knowledge, problem-solving, communication, culture fit). This can facilitate discussion when debriefing. Encourage panel members to take notes on key points from each candidate's answers.

**Thorough Reference and Background Checks:** Once you have a leading candidate (or two), check references diligently. Speak with previous supervisors (often Superintendents), colleagues or board members from the candidate's past districts. Ask not just about technical skills but also reliability, ethics, teamwork and how they perform under pressure. Verify degrees and certifications, and do a background check as required by law.

After weighing all the information – interview performance, references and even gut feelings – make your selection and proceed to the job offer stage. Involve your school board as needed (in many districts, the board will ratify the superintendent’s CBO recommendation and, in some cases, may want to meet the final candidate).

**Prepare the Employment Offer and Contract:** Before finalizing the hire, ensure you have a well-drafted employment contract or agreement for the CBO. This document should clearly spell out terms such as:

- **Duration of the Contract:** For example, one year or multiyear (if allowed), and starting date.
- **Salary and Benefits:** Base annual salary, pay schedule, fringe benefits, vacation days, sick leave, health insurance, retirement contributions, etc.
- **Duties and Expectations:** Incorporate by referencing the job description or list key expectations; possibly outline any specific goals for the first year.
- **Evaluation Process:** State how and when evaluations will be done (e.g. annually by the Superintendent, with possible input from the board), and that continued employment is contingent upon satisfactory performance.
- **Termination/Severance Clauses:** List the conditions under which the contract can be terminated by either party (e.g. for cause, nonrenewal notice timelines, any severance pay if without cause). Ensure this aligns with board policies and legal advice. Having an attorney review the contract is prudent.
- **Professional Development and Memberships:** It’s wise to include support for the CBO’s development, such as, “District will budget for CBO’s attendance at the CASBO Annual Conference and other training,” or “District will pay fees for CASBO CBO Symposium and Annual Conference.” This underscores that you value ongoing learning (and benefits the district through the CBO’s improved expertise).
- **Other Specific Agreements:** List other items included with employment, such as mileage reimbursement or car allowance, device (phone/laptop) provisions, moving expenses if relocating – depending on what was negotiated.

Use a **checklist** to verify all important terms are in the contract before both parties sign.

Once the offer is accepted and the contract is signed and approved by the board, **congratulations** – you’ve successfully hired your CBO! But your work doesn’t end here. In fact, one of the most crucial aspects of this guide comes next: Setting up your new CBO (or any CBO) for long-term success through proper evaluation and support.

## STEP 6

# Commit to Your CBO's Growth and Success

Hiring a CBO is a significant investment. To reap the full benefits, it's essential to **actively support and develop your CBO** after they're on the job. A Superintendent-CBO relationship built on mutual trust, continuous feedback and shared goals will yield strong results for the district. Step 6 is about planning for that success from day one:

- **Onboarding and Transition:** Ensure a smooth start. Introduce the new CBO to key stakeholders and staff, schedule them to present at an early board meeting (even just an introduction and their initial plan) and clarify decision-making authorities. Early wins might include a welcome tour of school sites or meetings with principals to signal the CBO is here to support schools.
- **Set Clear Goals Together:** Within the first couple of months, work with the CBO to set **measurable goals** for their first year. Use a Goal-Setting Worksheet to document a handful of key objectives – for example, “Implement a new budget monitoring system by Q4,” or “Develop a five-year facilities maintenance plan.” Align these goals with district strategic priorities. This gives the CBO direction and a sense of accomplishment when achieved.
- **Provide a Mentor or Network:** If the CBO is new or came from a smaller role, pair them with a seasoned mentor (perhaps a retired CBO or a neighboring district’s CBO) whom they can call for advice. Also encourage them to connect with peers (through CASBO section meetings, the CASBO mentoring program and CASBO biweekly CBO roundtables). Having someone to bounce ideas off can be invaluable in the first year.
- **Commit to Ongoing Professional Development:** Make it clear that you expect and support your CBO’s **continuous learning**. Whether it’s attending the **CASBO CBO Symposium**, participating in FCMAT’s **CBO Coaching and Induction Program**, specialized workshops (e.g. on school bond financing or new legislation) or pursuing advanced certification like **CASBO’s CBO Certification**, your CBO should regularly update their skill set. In California’s ever-changing educational finance landscape, this is not optional – it’s vital to keep up with best practices and compliance requirements.
- **Integrate the CBO into the Leadership Team:** Treat your CBO as a true partner. Include them in cabinet meetings and strategic planning retreats, not just when finance is on the agenda. The more the CBO understands the instructional and community aspects of the district, the better they can align resources to support them. Likewise, ensure the CBO has seat at the table with the board on relevant discussions (budget, facilities, negotiations) and has the platform to present recommendations directly when appropriate. Your public support of your CBO’s expertise in front of the board and community will strengthen their authority to do the job effectively.

Many of these support practices will continue long after the hire is made. In the next sections, we delve deeper into formal evaluation of your CBO and strategies to **invest in their long-term success**, both of which are extensions of committing to their growth.

## Coming Soon: CASBO Strategic School Business Coaching Academy

### **Vision**

A sustainable, scalable professional coaching academy – anchored in trust and evidence-based leadership – to elevate the confidence, effectiveness and strategic mindset of school business leaders.

### **Program Overview**

The CASBO Strategic School Business Coaching Academy provides a powerful professional development experience for CBOs and senior school business leaders. In partnership with a leading university, this academy brings together experienced practitioner-coaches and aspiring or sitting CBOs in a rigorous, research-based coaching model.

The academy is rooted in the belief that great leadership is grown – not born – and that peer-driven coaching is one of the most powerful levers for leadership development in the school business profession.

### **Goals**

- Establish and enhance CBOs' strategic thinking, emotional acumen, resource design and change-management skills.
- Prepare CBOs to lead radically inclusive, deeply impactful and sustainable change efforts.
- Disseminate learnings from coaching sessions that build leadership capacity and elevate contributions to the school business profession.

## Evaluating Your Chief Business Official

Most LEAs already have established evaluation systems for administrative staff. While these frameworks often provide the structure, it's important to recognize that the CBO role carries distinct statutory and operational responsibilities that merit tailored evaluation criteria. Areas of focus for a CBO's evaluation may include: statutory deliverables and compliance-based outcomes, such as budget development and adoption; first and second Interim Reports; unaudited actuals; external audit preparation and responsiveness; and support of the Independent Citizens' Oversight Committee (ICOC) if the LEA has an active bond program.

If payroll is included in the CBO's responsibilities, the CBO's evaluation may include timely and accurate payroll consistent with labor laws and state pension systems. If purchasing is part of the role, the evaluation should include successful and compliant procurement activities that meet the needs of the district. If M&O is included, the evaluation should assess the safety of learning environments. And if the district has charter schools, oversight of those sites should be part of the evaluation.

Including these focus areas in your evaluation process can help ensure alignment with state expectations and reinforce performance in critical, high-accountability domains.

## Supporting and Developing Your CBO for Long-Term Success

Hiring the right CBO is only the beginning. The **true value of a CBO is realized over the long term** as they become more effective and integrated into the district. As a Superintendent, your leadership includes creating an environment where your CBO can thrive. This section offers strategies and resources to ensure your CBO continuously improves, stays current and remains committed to your district.

## Partnering With CASBO and Other Resources

CASBO is your district's ally in making sure your CBO succeeds. We are devoted to the ongoing professional growth of school business leaders and offer a plethora of development opportunities and support. Encouraging your CBO to engage with CASBO is one of the best investments in their effectiveness. CASBO provides:

- **Professional Development and Certification:** Workshops, certification programs and an annual conference that covers everything from legislative updates to technical training. Through CASBO's programs, your CBO can maintain any certifications (like CBO certification) and stay up to date with **industry best practices and legal changes**.
- **District-based membership:** Ensures your entire team can access a full range of education, advocacy and networking opportunities. This model helps every department stay informed, connected and equipped with the resources needed to support effective school business operations.

- **Advocacy and Information:** CASBO keeps its members informed about pending legislation, state budget developments and regulatory changes that affect school business. By staying engaged, your CBO can alert you and the board to important developments (like new pension contribution rates or one-time state funding opportunities) so your district can proactively respond. CASBO often advocates on behalf of schools at the capitol; your CBO's involvement can amplify the district's voice on critical issues.
- **Networking and Peer Support:** Perhaps the greatest benefit is CASBO's extensive network of professionals. The organization facilitates networking through regional sections, committees and an online community of practice. By connecting your CBO with peers, you enable them to share solutions and get advice on challenges. Often, someone in another district has faced a similar issue – whether it's implementing new software or navigating a budget crisis – and your CBO can learn from their experience. As one CBO describes:

"This kind of insight and idea-sharing is impossible to get if a CBO operates in isolation. By encouraging your CBO to attend CASBO events or serve on a CASBO committee, you're indirectly bringing back knowledge to your district."

In summary, **CASBO is a lifeline** for keeping your CBO at the forefront of school business management. It's highly recommended to budget for at least membership and annual conference attendance. Consider it part of the district's professional development investment.

## Fostering a Positive Superintendent-CBO Dynamic

A CBO will be most effective when they have the **confidence and backing of their Superintendent**. Here are a few tips to maintain a healthy working relationship and empower your CBO:

- **Trust and Empowerment:** Avoid micromanaging the CBO's day-to-day work. After all, you hired them for their expertise. Trust them to make operational decisions and back them up if those decisions are challenged (unless there's clear evidence of error). This doesn't mean you aren't in the loop – maintain open communication so there are no surprises – but show that you **rely on their judgment**. In turn, the CBO will feel ownership and pride in their work.
- **Regular Check-Ins:** Schedule a dedicated one-on-one meeting with your CBO at least biweekly (if not weekly) to touch base on key projects and emerging issues, and to provide guidance. These check-ins are opportunities to catch small issues before they become big problems and to give timely feedback or praise. They also signal to the CBO that their work is a priority for you.

- **Unified Front:** Present a unified leadership front with your CBO, especially in public settings like board meetings. If disagreements on recommendations occur, discuss them privately beforehand. When the board asks tough financial questions, allow the CBO to answer directly as the content expert (jump in to support or clarify as needed). Demonstrating mutual respect and alignment instills confidence in other administrators and the board that the “education side” and “business side” are working hand in hand.
- **Include the CBO in District Visioning:** A CBO who understands the instructional vision of the district will make better financial decisions. Involve your CBO when crafting initiatives like a new strategic plan, major grant proposals or curriculum adoptions (at least on the periphery) so they grasp the “why” behind resource allocations. This inclusion also validates their importance beyond number crunching.
- **Recognize Their Achievements:** Publicly acknowledge the CBO’s contributions whenever appropriate. Did the CBO’s team get a clean audit or earn an award for financial reporting? Mention it at a board meeting. Did they navigate a bus driver shortage or cafeteria upgrade smoothly? Let the board know. Such recognition not only motivates the CBO but also educates others on the value the CBO brings.

## Commitment to Professional Growth

A key aspect of long-term support is maintaining an environment of learning. We’ve highlighted CASBO and formal programs, but also consider these additional growth opportunities:

- **Job Shadowing/Cross-Training:** Encourage the CBO to spend a day seeing other parts of the district (classrooms, bus depots, maintenance shops) to better understand the impact of their work. Conversely, give other administrators a chance to learn the basics of school finance from the CBO. Teaching others often deepens one’s own mastery and breaks down “us vs. them” silos.
- **Stay Current with Technology:** Support the CBO in adopting modern tools – be it a new financial software, data analytics for budgeting or communication platforms. Many new CBOs drive improvements like online budget dashboards or digital work order systems. Be open to these ideas and help champion necessary investments in technology that can make operations more efficient.
- **Plan for Succession:** This may sound premature if you just hired a CBO, but part of supporting them is ensuring continuity if they retire or leave eventually. Set an expectation that they will mentor their staff and develop an internal pipeline (maybe an Assistant Business Manager) so the district isn’t left in the lurch. A confident leader will appreciate the notion of building legacy through others.

Ultimately, a Superintendent's genuine care for the CBO's development will be repaid in loyalty and high performance. As your CBO grows, they will find more savings and better solutions, and innovate in ways that keep your district running smoothly and effectively for students' benefit.

## Conclusion: Achieving Success Through Partnership

Hiring a Chief Business Official is one of the most consequential decisions a Superintendent can make – and supporting that CBO is an ongoing commitment. By following this guide, you have a road map to:

- **Define the CBO role** that perfectly fits your district's needs.
- **Recruit and select** a capable professional through a structured, thorough process.
- **Establish clear expectations and accountability** via thoughtful evaluation practices.
- **Invest in your CBO's success** with continuous support, professional development and trust.

When done right, the **Superintendent-CBO partnership becomes a driving force** behind a district's ability to achieve its educational mission. A well-supported CBO ensures that financial and operational decisions are sound, proactive and aligned with strategic goals. In turn, this frees you, as the Superintendent, to focus on instructional leadership and community engagement, confident that the “business of education” is in good hands.

Remember that you are not alone in this journey. Organizations like **CASBO, FCMAT, SSC** and the network of experienced superintendents and CBOs across California are ready to assist. Leverage those resources. As CASBO often emphasizes, **connecting your school business official to a professional network and ongoing learning** is an investment in your district's success.

By implementing the steps and strategies in this guide, you're taking proactive steps to strengthen the operational backbone of your school system. In education, every dollar and every decision counts, and with a strong CBO at your side, you'll ensure those dollars and decisions are maximizing opportunities for students.

Good luck with your CBO hiring and beyond, and may your partnership yield many years of stable budgets, smooth operations and successful outcomes for the students and community you serve!



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