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California Association of School Business Officials



ABOUT CASBO

The California Association of School Business Officials is the premier resource for professional development in all aspects of school business. Founded in 1928, CASBO serves more than 30,000 members by providing certifications and training, promoting business best practices, and creating opportunities for professional collaboration. CASBO members represent every facet of school business management and operations. The association offers public school leaders an entire career's worth of growth opportunities.

CASBO MISSION

As the recognized authority in California school business, CASBO is a member-driven association that promotes ethical values; develops exceptional leaders; advocates for, and supports the needs of, members; and sets the standard for excellence through top-quality professional development and mentorship, meaningful collaboration and communication, and unparalleled innovation.

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Exploring What Leadership Really Looks Like

“ More often, it’s about having the confidence to confront hard truths, make decisions with incomplete information and stand steady amid uncertainty.

Leadership in school business is rarely about choosing the easy path. More often, it’s about having the confidence to confront hard truths, make decisions with incomplete information and stand steady amid uncertainty.

The pages that follow explore what that kind of leadership really looks like. It’s not the kind of confidence rooted in bravado or certainty, but confidence built through preparation, self-awareness and the willingness to choose the harder path when it serves students and communities over the long term.

Today’s leaders are navigating decisions that test both judgment and resolve. In those moments, we won’t have all the answers. But we can trust in our processes, listen carefully and act with integrity, even when outcomes are uncertain.

My hope is that this issue invites reflection not only on the decisions you face, but on how confidence – quiet, practiced and earned – guides how you lead through them. ■■■

Tatia Davenport
CEO

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Foundations Built for Success!

When I started in school business almost 20 years ago, I didn't have the slightest clue what I was getting into, and I suspect that's a shared sentiment within the industry. I was just coming off an extended time of running my own business, and the Great Recession had impacted it to the point of near failure.

I went back to school to study accounting and my career counselor suggested looking at school business for a new start. "Schools are always hiring for their business offices," she said, "and the industry is very, very safe and secure once you get in."

I followed her advice, and ironically, I was pink slipped each of the first three years at my first district. But I was also saved each time at the 11th hour by way of good fortune or just dumb luck (golden handshakes, a new food services grant and a last-minute promotion).

I learned early on that I was expendable, as is everyone during times of budget constraints. I also realized that I needed to become indispensable, and the only way to do that was to become an expert at my craft.

It was during these early years that I was first introduced to CASBO via a Standard Account Code Structure (SACS)

Basics 101 training. It was in-person in a classroom setting and provided a necessary springboard that helped launch my success. Not only was I exposed to the beginner's tools I needed to become better, I also met others from nearby school districts who would become the basis of my professional network that I enjoy and rely on today.

Today's CASBO has taken what I was exposed to all those years ago and doubled – maybe even tripled – down on that experience.

CASBO School Business University (SBU) currently offers more than 110 specialized online courses tailored to meet your needs where you are right now. These courses are broken down into competency levels that include Foundational (50+ courses!), Intermediate and Advanced.

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Don't wait. The time for your success is RIGHT NOW, and we need you. Build foundations at every level of your journey and let CASBO show you the way. I look forward to seeing you at the top! ■■■

Aaron Heinz
CASBO President

Members In Action

This winter, CASBO members participated across California to educate, advocate and network. Use #casbo or tag us on LinkedIn & Facebook!



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Reorganizing for Resilience

When, Why Districts Should Reconsider Boundary Structures

By Christy White Brook, CPA, CFE, President, Christy White Inc.

School district reorganization – including unification, consolidation, boundary changes and transfers of territory – has long been part of California’s public education governance framework. While such actions are relatively rare due to their complexity and political sensitivity, changing demographic, fiscal and educational realities have prompted renewed interest in whether reorganization can be an effective tool to sustain educational quality and fiscal solvency.

This article outlines why districts may consider initiating a reorganization or supporting a citizens’ petition, how the process is formally undertaken

under California law and the most common barriers that reorganization efforts encounter.

Why Support Reorganization

Declining Enrollment and Loss of Administrative Efficiency

Many California school districts are experiencing sustained enrollment declines driven by demographic shifts, housing affordability and migration patterns. Declining average daily attendance (ADA) places downward pressure on revenues, while fixed administrative costs remain largely unchanged. Over time, this erodes administrative effi-

ciency and diverts resources away from classrooms.

California law expressly recognizes efficiency and sound fiscal management as valid considerations in reorganization decisions. County committees must evaluate whether a proposal promotes the efficient and effective delivery of educational services, and the fiscal sustainability of affected districts.

Redirecting Resources to the Classroom

A frequent motivation for reorganization is the opportunity to reduce duplicative administrative structures – such as

Reorganizing for Resilience

multiple superintendents, governing boards and central office functions – and redirect limited resources to instruction and student services.

It's important to note that California provides no direct state funding incentive for school district reorganization. Prior to the change to the Local Control Funding Formula (LCFF) revenue model, there was a financial incentive to reorganize. The incentive recognized that common salary schedules must be negotiated and that there are transition costs for newly reorganized school districts. States such as New York, Pennsylvania, Iowa and Nebraska provide financial incentives and transition support to encourage school district consolidation, whereas California currently does not.

Any fiscal benefit must come from administrative efficiencies, operational consolidation or cost containment measures, including, in some cases, school closures. These efficiencies may nevertheless be meaningful for districts facing prolonged enrollment decline and structural budget deficits.

Aligning District Boundaries with Community and Development Patterns

In some regions, school district boundaries no longer reflect how communities' function. Residential growth may occur in one district, while community centers, employment hubs or natural feeder patterns lie in another. Boundary changes or transfers of territory may better align schools with population centers, reduce transportation inefficiencies and reflect long-term land-use planning.

Boundary adjustments and transfers of territory are explicitly authorized under California law and evaluated by county committees based on educational, geographic and community considerations.

K-12 Unification for Educational Program Benefits

Unification of elementary and high school districts into a single K-12 district can support improved curricular articulation, data continuity and coordinated educational planning. Unified governance may allow districts to better align instructional strategies, expand specialized programs and support seamless transitions between grade spans – particularly for students requiring targeted interventions.

The legislature has long recognized unification as a legitimate reorganization goal where it enhances educational quality and long-term planning.

How the Reorganization Process Is Initiated

The statutory framework for school district reorganization is set forth in Education Code sections 35500 through 35799, and the procedural guidance is summarized in the California School District Reorganization Handbook. A proposal may be initiated by:

- Adoption of a resolution by a governing board.
- A petition signed by the required number of registered voters.
- Action by a county committee on school district organization on its own motion.

Once initiated, the county committee reviews the proposal for completeness, conducts public hearings and evaluates the proposal against statutory criteria, including educational quality, fiscal impact and community identity (EC §§35502, 35558). Depending on the type of reorganization, the process may also require:

- Approval by the State Board of Education.
- An election of affected voters.

From initiation to implementation, the process typically takes 18 months to three years – sometimes longer.

Barriers to Reorganization

Successful school district reorganization requires purposeful leadership and perseverance. The process is inherently political and opposition – often vocal and emotional – can spoil even the most carefully analyzed and reasonable proposals. Guiding a reorganization effort demands skilled educational and fiscal leaders who can thoughtfully shepherd the process from concept through implementation. Despite these challenges, reorganization can be deeply rewarding and is often in the long-term best interest of the affected districts and their communities.

Common barriers include:

- **Failure to Meet Statutory Criteria**
County committees must determine whether a proposal meets the criteria set forth in Education Code Section 35753, including educational effectiveness, fiscal sustainability, non-segregation on the basis of race or ethnicity, avoidance of school housing issues and alignment with community identity. Proposals that do not substantially meet the criteria fail.

- **Disparate Funding Characteristics**
A frequent and significant barrier is the financial mismatch between districts. For example:

A community-funded (Basic Aid) district may lose its fiscal advantage if it unifies with territory that has a lower assessed valuation per pupil.

Districts with high unduplicated pupil counts (UPC) may fear that reorganization could dilute targeted resources intended for high-need students.

While county committees must consider fiscal equity, the Education Code does not provide a mechanism to equalize these disparities through reor-

ganization. Any funding loss would need to be recovered through administrative cost savings.

- **Political Will and Community Support**

Reorganization proposals often face resistance rooted in local identity, governance concerns and fear of loss of control. While voter approval is not always required, community sentiment plays a significant role in county committee decisions and, where applicable, election outcomes.

- **Leadership, Communication and Time**

Successful reorganization requires sustained support from district leadership, clear and consistent communication and patience. The length and complexity of the statutory process can discourage stakeholders seeking faster solutions

to fiscal stress, even when long-term benefits may exist.

Recapping the When, Why of School District Reorganization

School district reorganization is neither simple nor quick. It's a highly regulated process that requires careful fiscal analysis, educational planning and community engagement. While California offers no direct financial incentive to reorganize, administrative efficiencies and improved alignment of educational programs may provide meaningful long-term benefits – particularly for districts facing declining enrollment or fragmented K-12 systems.

When approached strategically, transparently and with a clear understanding of statutory requirements,

reorganization can be a viable governance tool to align school district structures with California's evolving educational and demographic landscape. ■■■

Christy White Brook is a certified public accountant and a certified fraud examiner with 40 years of experience with a school district in auditing, business consulting and school finance training. She regularly conducts school district reorganization feasibility studies and advises both school districts, parent groups and county committees on school district organization. Christy White Inc. is a CASBO Premier Partner.



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Chris Delehanty Built His Career by Embracing Change – and Helping Others Navigate It

By Nicole Krueger



Hope Harris Photography

When Chris Delehanty started out as a fifth grade teacher, overhead projectors were standard classroom technology and getting a computer cart was something to celebrate. By the time he became an assistant principal, mobile learning devices had begun seeping into classrooms.

Although he didn't have a professional background in technology, he volunteered to co-chair his district's tech committee, where he became a driving force behind putting Chromebooks into students' hands.

Since then, his career has grown in lockstep with the shift in education toward evidence-based, technology-empowered learning.

"When I became principal, I was bringing on Chromebooks as quickly as I could and working to give teachers the opportunity to experiment with using them in meaningful ways," Delehanty recalls.

That focus catapulted him into the role of technology director for Del Mar Union School District at a time when schools across the nation were undergoing a digital revolution. Before he knew it, he was implementing a learning management system and developing a districtwide technology plan.

"I didn't know a switch from a router, but I liked incorporating technology into the classroom and I like learning new things," he says, adding that the experience taught him valuable lessons about how to lead others through a major transformation. "How we roll out changes is really important. When you make a dramatic change, people need to understand the why behind it." Not only did working at the district level propel Delehanty out of his comfort zone, but it also taught him the value of a strong professional network.

"It was the first position I'd been in where I realized I was the only one in the district doing that job," he says. "The power of having a network beyond your district became really clear to me."

That realization would shape the rest of his career. From technology, he moved into facilities and capital programs, overseeing modernization projects and a district bond program. The work reinforced the importance of both learning new systems quickly and knowing who to call when questions arose.

Those experiences led him to participate in CASBO's Business Executive Leadership (BEL) Program, which helped set him up for his current role as assistant

superintendent of business services. Since then, he has become increasingly involved in CASBO leadership, including teaching for the BEL Program and serving as assistant chair for the Legislative Committee.

"It's an opportunity to give back on a greater scale," he says. "Whatever feeds you – leadership, advocacy, presenting – there are opportunities. That's what makes CASBO special."

Always a teacher and learner, Delehanty remains intentional about staying connected to classrooms, even from the business office. He regularly visits school sites, walks campuses with principals and engages students and staff during modernization projects. His teaching background continues to influence his leadership style, particularly in how he structures meetings and builds culture.

"I try to think about how I'm engaging people in solving a problem," he says. "How am I setting the stage so that all of the voices in the room are part of it?"

At the core of his work is a commitment to helping others succeed.

"My vision is really about supporting the development of the people around me," he says. "When they move on to do something great, that's a success." ■■■



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Meredith Brown Helps Districts Turn Community Dreams Into Legally Sound Realities

By Nicole Krueger



The community wanted a baseball field. The district had no money to spare – just an empty space behind a school and a bunch of helping hands eager to volunteer.

What they needed was someone to help them figure out how to do it without running afoul of the law.

That's the kind of project Meredith Brown loves to tackle.

"Most of my work has some sort of community aspect – people collectively working on addressing basic needs, such as education, transit or housing," says Brown, a partner with Atkinson, Andelson, Loya, Ruud & Romo (AALRR), a CASBO Premier Partner. "My favorite projects are the ones where everybody wants to work together and comply with the law, and they just need someone to help figure out how all the pieces fit together."

Brown has spent more than three decades helping school districts and other public entities navigate the ins and outs of construction law and regulatory compliance. Originally from Texas, she earned a bachelor's degree in agricultural economics and international development from Cornell University. "It was legal in nature, looking at the way people work out issues and disputes on a global scale," she says.

During her time at Boston University School of Law, visits to Ghana and Senegal showed that people around the world were grappling with many of the same problems. "I guess it's kind of the same thing, just a different zip code."

That global lens pairs naturally with Brown's hands-on background. She grew up helping her dad remodel houses, crawling across rooftops and mixing stucco with paint to get just the right texture. Over the course of her career, she has gone on to work on power plants, bridges and other large-scale infrastructure projects – experiences that gave her a deep appreciation for how things are built, both physically and bureaucratically.

Still, the projects that excite her most happen closer to home. "Sometimes districts decide to get creative and collaborate with a community partner to benefit the community, and people are trying to figure out how to work together and do something that maybe hasn't been done before."

Whether she's building a retaining wall for her chicken coop, bartering eggs at the farmer's market or helping a school develop affordable housing for teachers, the underlying principles remain the same.

"These are things people have been doing since they first made settlements by rivers. People have always bartered and traded with fellow community members," she says. "When I work with CBOs, it's like a microcosm of the global trade agreements I studied in school. Everyone is trying to figure out what's best for their community and find a solution that's fair and equitable."

For Brown, the work is about helping people figure out how to move forward within a complex web of rules. That role – knitting together compliance, fairness and shared goals – is where Brown feels most at home.

"People in education are generally heart people. They care what happens to others," she says. "It's rewarding if you can come up with a solution that helps make things work. The satisfaction is really in feeling like I'm helping society function in a positive way instead of chaos." ■■■





Ivan Joseph, Ph.D.

Confidence Coach Helps Leaders, Teams Unlock Peak Performance

By Julie Phillips Randles

How confident are you on your current career path?

Your answer isn't an emotional guess or brag or bravado, assures Ivan Joseph, who holds a doctorate in sport psychology from Capella University in Minneapolis. It's actually measurable by this yardstick: How do you behave when no one is watching? Do you still prepare? Do you still tell the truth? Do you still choose the harder path?

Those actions, he assures his audiences, is real confidence.

"Confidence isn't believing you're exceptional. It's believing you'll be okay, even when you're not great yet ... [you] grow deep confidence quietly by raising your standards of how you show up

and by seeking feedback," he tells his LinkedIn followers.

And that's exactly why he has found success for more than 30 years. He labels himself a scholar-practitioner, high-performance and confidence coach. His focus has been consistent – his Ph.D. journey concentrated on studying the links between grit, confidence and high performance; his masters in higher education administration at Drake University in Des Moines, Iowa, focused on how to make people feel like they matter and belong in order to achieve excellence.

As a professor and soccer coach at Graceland University, he developed the soccer program from the ground up –

leading both the men's and women's teams to No. 1 national rankings and guiding the men to the school's first national championship, earning National Association of Intercollegiate Athletics (NAIA) National Coach of the Year honors. He later spent a decade as director of athletics at Toronto Metropolitan University (formerly Ryerson), helping elevate the program to new prominence

But Joseph isn't merely a sports guy (even if he is a car aficionado). His TEDx Talk, "The Skill of Self-Confidence," has more than 31 million views, and he's given presentations to more than 750 companies that focus on manufacturing, retail, pharmaceutical, technology, food and everything in between. Because at the

Ivan Joseph, Ph.D.

“Once you’ve admitted your mistake, apologized and come up with a plan so that it won’t happen again, let it go.”

heart, he’s driven by his own purpose: “I am an educator first and foremost,” he says.

His other secret? There isn’t a difference between a team of school district departments and a team wearing jerseys and bouncing a basketball. “When teams thrive, they elevate everyone to a level they didn’t know was possible,” he says. “When teams struggle, they create dynamics and challenges that limit performance.”

And all leaders achieve their goals by setting higher expectations to achieve new levels of performance. Joseph himself traveled this path. He moved with his family from his native Guyana to Canada when he was 5, where he was immediately different – the Black student on a white campus.

Later, he was the successful Black man experiencing the challenges and opportunities of being a designated hire. He admits to feeling imposter syndrome. But he didn’t let any of it turn him from building his own confidence and passing it on to new generations as the vice president of student affairs at Wilfrid Laurier University, and a similar role at Dalhousie University. Currently, he’s an executive coach to McMaster Organizational Leaders Program participants at the DeGroote School of Business.

CASBO sat down with him before his presentation at CASBO Con 26 for a peek into his winning message.

Is there a specific mentor, book or experience from your early career that fundamentally shaped your approach to your work today?

Early in my career, *Golf Is Not a Game of Perfect* by Bob Rotella, Ph.D., fundamentally changed how I understood performance and confidence. The book introduced me to the idea of letting

go of perfection and not dwelling on my mistakes. I learned to visualize the outcome I wanted from Dr. Rotella. That shift – away from obsessing over mistakes and toward trusting preparation – was transformational. In many ways, that book planted the seed for everything that followed. It directly influenced my decision to pursue a Ph.D. in psychology and shaped what has become my life’s work: helping people understand that self-confidence is not a personality trait you’re born with, but a skill you can train.

What’s one nonnegotiable part of your daily routine that helps you stay focused and productive?

I don’t have a rigid nonnegotiable – and that’s an honest answer, particularly for a leader with ADHD. What I do know is this: When I start my day with a written agenda and a prioritized list, my productivity increases dramatically. Clarity creates calm. Structure creates freedom. One of my best scheduling tips is to intentionally preserve time daily for unexpected issues. I usually block 30 minutes to an hour after lunch for administrative agility, so that I can easily address things before they snowball.

For leaders, especially in complex systems like school districts, it’s not about perfection in routine – it’s about creating just enough structure to reduce cognitive noise, so you can focus on what truly matters, while leaving space for the inevitable surprises or crises.

Your core message is that self-confidence is a skill, not a trait. When a school business leader faces a major setback, what’s the very first practical step they should take to retrain their confidence skill?

The first step is simple, but not easy: Let go of the mistake.

Once you've admitted your mistake, apologized and come up with a plan so that it won't happen again, let it go. Interrupt the spiral. If you're beating yourself up, pause and deliberately remind yourself of your competence and track record. Confidence doesn't grow by pretending mistakes didn't happen; it grows by refusing to let one moment redefine your identity or sidetrack your whole afternoon.

I often return to three affirmations:

1. *I am the captain of my ship and the master of my fate.*
2. *I can learn anything.*
3. *You've got this.*

Confidence training begins with what you say to yourself after things go wrong.

You've spoken about the danger of confidence turning into ego or "confident humility." In the high-pressure school leadership environment, how can a leader remain confident in their strategic vision, while being humble enough to solicit and truly listen to critical feedback?

Ego is loud. Confidence is quiet.

Ego is what you tell other people about yourself. Confidence is what you tell yourself: *I can accomplish the task at hand.*

In high-pressure leadership environments, humility is not weakness – it's a performance strategy. Actively seeking feedback, listening without defensiveness and acting on what you hear strengthens both your

“Ego is loud. Confidence is quiet.”

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Ivan Joseph, Ph.D.

“**Confidence multiplies when leaders make competence visible to everyone.**”

decision-making and your credibility. Leaders who do this aren't less confident; they are more adaptable and more trusted.

Leaders often rise through the ranks by mastering a specific playbook. How can school business leaders avoid the “fixed mindset” trap – a belief that their past success means they already know the best solution?

Past success is a terrible teacher if we let it convince us we've “figured it out.”

The moment we rest on accomplishments, we stop learning. High-performing leaders continually ask: *Can we do this better?* That question keeps confidence elastic rather than brittle. It signals curiosity, not insecurity

– and it's the antidote to stagnation in fast-changing educational and financial environments.

How can district leaders promote the skill of self-confidence in team members?

Confidence grows fastest when leaders catch people doing things right.

This isn't about lowering standards – it's about reinforcing the behaviors you want repeated. Specific, timely and public recognition builds accurate confidence. When people see clear examples of what's desired and hear from leaders that they're capable, they take ownership, speak up earlier and solve problems faster. This engenders trust and loyalty across your division and within the people you lead.

Confidence multiplies when leaders make competence visible to everyone.

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You highlight that self-confidence, cohesion and expectations drive team performance. For a team responsible for managing millions in public funds where accountability is paramount, what is the balance between creating a culture of trust and maintaining necessary layers of oversight?

Trust and accountability are not opposites. In fact, clear expectations, transparency and consistent accountability are what make trust possible. Positive reinforcement does not eliminate the need for difficult conversations – it makes them more effective.

I let folks on my teams know what they're doing well and where they need support. Ask: How can we get you there? Do you need more training, shadowing, access to equipment or hands on deck to meet the standard?

When roles, metrics and decision rights are explicit, people know where they stand. That clarity reduces anxiety, minimizes defensiveness and allows teams to perform at a high level without fear-based micromanagement.

You advocate for fueling success through inclusivity and diversity. From a confidence and performance perspective, how does fostering a sense of belonging among staff translate into improved financial management, better resource allocation or greater innovation?

We often romanticize diverse teams. The reality is that truly diverse teams can be clunky, slower at first and occasionally uncomfortable. That's not a flaw – it's the feature.

Differing perspectives introduce *productive tension*. That tension, when managed well, leads to better financial decisions, smarter resource allocation and more innovative problem-solving.

Belonging doesn't have to come from being alike. Belonging comes from being acknowledged for who you are and what you uniquely and genuinely bring to your team. When people feel that their individual perspectives and contributions are valued, it gives them the confidence to challenge assumptions, flag risks earlier and propose alternatives that homogenous teams often miss.

School districts serve incredibly diverse communities and business decisions must reflect that. How can a school business leader, using the principles of self-confidence, ensure that underrepresented staff voices are heard and valued, even when those perspectives challenge the status quo?



From a self-confidence perspective, this begins with the leader.

Leaders who are secure in their competence don't need consensus to feel validated. They don't fear dissent – they invite it. Creating space for underrepresented voices requires confidence strong enough to tolerate discomfort.

Practically, this means:

- Actively soliciting perspectives from those who speak least, not most.
- Rotating assignments for high-profile tasks and projects so that the “usual suspects” or the most eager volunteers aren't the only ones with opportunities for growth and promotion.
- Rewarding thoughtful dissent rather than only alignment.
- Separating *challenge to ideas* from *challenge to authority*.

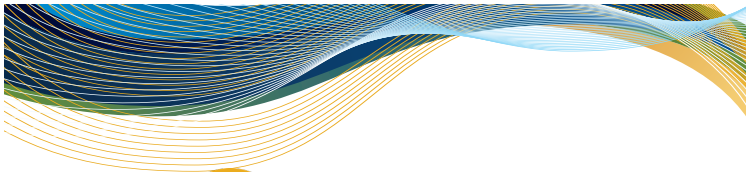
People around the tables I lead will tell you they often hear me say, “That's a

great question. Thanks for bringing that forward.” Or, “Tell me more about that. How will it move us toward our goal?”

Leaning in to other people's ideas teaches those at the table that their contributions are welcome and appreciated. When leaders model this behavior, they send a powerful signal: *Your voice matters here*. That sense of psychological safety doesn't dilute standards – it sharpens them. It leads to more rigorous scrutiny of decisions, fewer blind spots, and ultimately, better stewardship of public resources.

Inclusivity isn't about being comfortable. It's about having enough confidence in your leader and team to contribute fully and honestly. ■■■

Julie Phillips Randles is a freelance writer based in California.



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Time's Running Out – Federal Energy Incentives Are Ending

By Thomas Jackson, Corporate Vice President, Climatec Energy, BOSCH Building Technologies
Bruce Dickinson, President, Eagle Energy Solutions, LLC

Across California and the West Coast, public agencies have invested in energy modernization projects, including solar, battery storage and energy efficiency, to cut operating costs and protect their budgets against rising utility rates. The Inflation Reduction Act (IRA) provides substantial tax credits in the form of direct-pay incentives, covering 30% of these project costs, with an additional 10% bonus credit for some customers in qualifying regions. To secure these tax credits and get in line for eligible equipment before the looming deadlines, public agencies must act now. Here's why.

The Queue Is Forming Now and It's Moving Fast

Over the past two years, interest in developing and installing clean energy projects has surged. Agencies hoping to benefit from current federal funding programs or lock in today's construction prices need to act quickly, with at least 5% of their project "in construction" by July 4, 2026. This means the project should be under contract and construction started in June 2026.

Waiting too long risks missing key windows to secure financing and achieve interconnection approvals.

A Realistic Project Timeline: Longer Than You Think

From initial feasibility to fully commissioned systems, a typical project spans multiple stages, each with its own lead times.

Here's a simplified breakdown:

- Request for Proposal (RFP) issuance and selection.
- Preliminary scope and budget analysis and development.
- Contracting (Energy Service Agreement, or ESA).
- Engineering and permitting.
- Procurement of long-lead equipment.
- Construction and commissioning (Permission to Operate or PTO).

For an agency to complete all stages by 2030, an RFP must be awarded and a contract must be finalized by late April or early May 2026. Delaying may cause missed equipment ordering windows, permitting delays and construction start dates slipping into Q3 2026. Many of the critical components of solar and battery projects, including solar modules, steel for carports, inverters, transformers and switchgear have multi-month lead times.

Failure to contract early often results in:

- Higher equipment costs.
- Fewer installation options.
- Delays in engineering or interconnection.
- Limited control in securing quality energy service providers.
- Potential for missed deadlines.

The Bottom Line: Start Sooner Than You Think

While public agencies with projects under construction by July 2026 have until 2030 to ensure projects are operational, the

runway is shorter than it looks. Acting now gives agencies the best chance to:

- Hedge against double-digit utility increases.
- Capture available funding.
- Lock in predictable project costs.
- Keep timelines realistic and achievable.
- Remain financially or operationally feasible.

Take Advantage of Energy Storage Project Tax Credits that Continue through 2032

Because many public-sector projects include multiple clean energy scopes, agencies need to think strategically about:

- Which sites already have solar but may need energy storage.
- Which larger sites offer the best return with adding energy storage only.
- Add site-by-site scopes that meet IRA program requirements and include refurbishing older solar PV systems.

As Elvis Presley famously sang years ago, "it's now or never" when it comes to capturing your fair share of IRA funding! Will you act fast, or will you snooze and lose out on significant funding? ■■■





Creating Conditions for Women to Thrive

How Women Are Navigating the Path to the School Business C-Suite

By Jennifer Snelling

In the world of school business, where budgets are tight and stakes are high, women often find themselves performing a second invisible job: tone management. One California school business leader admits she adds a smiley face to 20% of her correspondence just to ensure her intentions aren't misinterpreted.

Her experience highlights a recurring theme for women in educational leadership – the exhausting effort to remain “friendly,” while being effective.

According to UNESCO's Global Education Monitoring Report 2025 (Gender Report), female leadership is linked to stronger community engagement, more inclusive policies and collaborative school cultures. And in some cases, learning outcomes improve in schools led by women.

While women have made strides in school leadership, studies suggest there is still work to do. Women Leading Ed's

second annual insight survey found that women still lead only 30% of the nation's largest school districts. Similarly, the UNESCO report found a 20% gender gap in secondary school leadership positions. Women Leading Ed also found that gender bias impacts women leaders' physical and mental health, career pathways and compensation. According to 93% of women leaders, burnout is a major problem.

Given that women in leadership roles benefit organizations overall, how do districts ensure that conditions support not only their advancement into leadership positions but also their ability to thrive in those roles?

Beyond Expertise

Building expertise in your field is the No. 1 thing women can do to achieve and succeed in a position. But sometimes

expertise is not enough. CASBO heard from many women in leadership who recounted instances of being passed over for a promotion by a male colleague with less expertise. Or being talked over by men in meetings. None wanted to go on the record for fear of offending their colleagues.

Candace Reines, assistant superintendent of business services at Perris United High School District, has focused on developing her ability to speak with confidence and authority. Reines, who became a business services director at 28 and a CBO at 31, appreciates direct communication.

“It comes down to being reliable and consistent,” she says. “Any of us can come off as abrasive to someone, but once they get to know you and what you are accomplishing, that will be forgotten.”

Besides expertise and public speaking, there are many skills women can lean

Creating Conditions for Women to Thrive



“ Learning something new isn’t always comfortable. Part of growing in leadership is stepping into that discomfort.”

into or develop that will serve them in leadership positions.

Jennifer Cassetta is the author of *The Art of Badassery: Unleash Your Mojo With Wisdom of the Dojo*. Cassetta says there are many skills that many women already have and can lean into for success. Those skills include empathy, inclusiveness, collaboration, emotional intelligence and leading with a purpose.

Many of us need to work on boundary-setting, communicating those boundaries clearly, using our internal voice to instill empowering beliefs and practicing self-care.

Michelle Howe-Kelton, director of financial services at Lemon Grove School District, found that, while she was confident in the knowledge she needed for her job, she was less confident in her ability to articulate that knowledge. Like Reines, she knew she needed to get more comfortable with public speaking, so she asked her CBO if she could start present-

ing at board meetings. In doing so, she “got comfortable with being uncomfortable,” she says.

Reach for a Stretch Role

There’s a lot of research showing that women tend to believe they need all the qualifications before even applying for a position, whereas men are more confident they will grow into the role. Jennifer Lewi argues that, “Learning something new isn’t always comfortable. Part of growing in leadership is stepping into that discomfort.”

Lewi is a former vice president of the School Nutrition Association; she’s now the founder of Design Your Next Step coaching. One of Lewi’s clients hoped to become a CBO. The position came down to two candidates, and the other person got it. Lewi encouraged her client to view the setback as a learning opportunity. She sought feedback on what she could have done better and realized that the other person was the stronger candidate. A few years later, she tried again and got the position.

“Seek feedback to learn how you’re being perceived and fix that,” advises Lewi. “We are often evaluated on where we are now. You may get rave reviews and wonder why you aren’t being promoted. It’s important to communicate the path you want going forward.”

Seek Allies

We all need a little help from our friends. That’s especially true in the workplace. Yet only 44% of women have benefited from mentorship and 22% from sponsorship, according to the Women Leading Ed study. Regardless of a formal mentoring or sponsorship relationship, finding allies who will support and advise you as you grow into your career can be immensely helpful.

Howe-Kelton has used CASBO to build her own personal board of advisers. She reaches out to her network daily. They often check in with each other when a big report is due to the state, bounce ideas off each other, recommend vendors and answer questions for each other. CASBO's Women in Leadership Conference, held in February and returning next year, is a great place to build a network of women supporting other women.

Reines credits a mentor at the beginning of her career with influencing her trajectory. Early on, Reines was in a district with many dedicated people who had been there for a long time. She and her mentor, both newer to the district, wanted to push for some changes to make things work more efficiently.

Reines learned from watching her mentor navigate the situation with skill and expertise.

Now, Reines runs a statewide school business academy where a cohort of applicants learn about school business to help them decide if it is the right career path. It's also an excellent place to meet allies.

"The technical competence is what gets us in the door," says Reines. "But it's the relationships that keep us at the table."

As Reines discovered, acting as a mentor can be as helpful as having one yourself. That's because we often learn through guiding others.

Lewi teaches a framework called FRAME to encourage allies to empower each other.

“ It’s important to communicate the path you want going forward.

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Creating Conditions for Women to Thrive

“As you grow as a leader you need to grow other leaders by helping them find their own solutions.”

Frame stands for:

1. **Focus.** Be present for a conversation.
2. **Recognize** the implicit assumptions you're making or the history you have with the person.
3. **Ask** open-ended questions and allow for silence.
4. **Mirroring.** Recap what the person said, and they can tell if you understand what they're saying.
5. **Empower** them to come up with the solution.

A big benefit of the FRAME approach: It builds a network of people who can solve problems.

One of Lewi's clients had a fire in one of the schools in her district. Before following the FRAME approach, the client would have jumped in her car to put the fire out herself. Instead, she realized she had the right people in place to solve the problem at the site. She asked if there

was anything her school nutrition director needed, offered some guidance, then let her ally solve the problem without getting in her way.

“When we learn to lead we often think that we need to direct and guide people,” says Lewi. “That's part of the job, but as you grow as a leader you need to grow other leaders by helping them find their own solutions.”

Take Steps to Avoid Burnout

We all want to go home from work fulfilled and satisfied that we are competently doing meaningful work. Sadly, that is not always the case. The Women Lead Ed survey found that 58% of respondents were contemplating leaving their field. Among those considering leaving, 88% think about it at least monthly. How do women in leadership avoid burnout and protect their own mental space?

Cassetta has some recommendations from the dojo:

1. Embrace the suck. We're all going to get knocked down, but that experience expands our capacity to get through struggles.
2. When you get knocked down, how do you get back up?
3. Learn how to block attacks by setting boundaries and saying no to things that distract you from your purpose.
4. Pay attention to how you communicate with yourself. Use affirmative self-talk.
5. Identify what drains your energy, and lean into what energizes you.
6. Practice mindfulness.
7. Be a teacher. Grow your skills by sharing them with others.

Howe-Kelton says finding allies both in her district and outside is key to cultivating a positive dynamic in the work-



place. Another is agency, understanding what we can influence and what we can't. She considers herself lucky that her CBO encourages her to continue learning and growing.

Finally, aligning your purpose and goals with those of your district and co-workers creates a positive dynamic. Mostly, Howe-Kelton says, be true to yourself.

"Continue to speak your mind," she says. "Your opinions matter and are worthwhile." ■■■

Jennifer Snelling is a freelance writer based in Eugene, Oregon



What is your district doing to ensure women have a pathway to leadership? Share your advice at LinkedIn/CASBO.

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BUILDING THE CBO-SUPERINTENDENT POWER PAIR

Why This Hire May Be a
Superintendent's Most
Consequential Decision



BUILDING THE CBO-SUPERINTENDENT POWER PAIR

By Jennifer L.W. Fink

When Tina Douglas applied for the chief business official (CBO) position at La Mesa-Spring Valley School District in 2023, she was looking for a change.

Douglas had spent six years at San Dieguito Union High School District, serving first as associate superintendent and later as interim superintendent. While there, she worked with six different superintendents. The frequent turnover took a toll. So, although she once hoped to retire from San Dieguito, Douglas decided to apply for the open CBO role at La Mesa-Spring Valley instead.

It turned out to be the right move.

“I feel like I’m actually part of a very functional team that carries the burden of our work together,” Douglas says. “We’re going through budget reductions, but I don’t feel like the burden is all on my shoulders. We’re having conversations together about what we can do to reach the necessary reductions with minimal impact to people.”

That sense of shared responsibility is a hallmark of Douglas’s working rela-

tionship with David Feliciano, superintendent of La Mesa-Spring Valley. Though the two had not worked together previously, they quickly developed a true partnership grounded in trust, collaboration and aligned leadership. Together with the rest of the cabinet, they accomplish more with less stress than any of them could alone.

Douglas’s daily commute is now twice as long as it was previously, but she says the extra time in the car is worth it for the opportunity to collaborate with others who are as deeply committed to the success of the district and community as she is.

Feliciano, the superintendent, is equally grateful for the opportunity to work closely with Douglas.

“Like Tina, I worked as a CBO in a district that had five superintendents in four years. It was very hard,” he says. “One of the things that we have in common with our fellow executive team members here is that we’ve all worked in very dysfunctional places. So, as we were initially talking with Tina, it was very much about our leadership philosophy and our ‘why.’ I wanted to make sure we were aligned on those things.”

Alignment between superintendent and CBO may be one of the most critical drivers of district effectiveness.

“There’s so much more benefit to students when there’s stability and leadership in district administration,” says Sarah Niemann, Ed.D., director of management consulting services for School Services of California.

Superintendents who thoughtfully hire, intentionally onboard and consistently support their CBOs reap the benefits of the CBOs’ full range of skills and talents. But in the rush to fill a critical cabinet position, some districts simply copy, paste and repost an old job descrip-



Alignment between superintendent and CBO may be one of the most critical drivers of district effectiveness.



tion. That shortcut often misses the moment – and the opportunity.

“Hiring a CBO is one of the most consequential decisions a superintendent makes,” says Tim Stowe, Ed.D., superintendent of Torrance Unified School District. (TUSD).

As the education landscape continues to evolve, superintendents must take a more intentional, strategic approach to building this critical leadership partnership.

The CBO Role Has Changed – and Expectations Must Change with It

CBOs are no longer just the “numbers” or “business” people in a school district. They’re involved in every aspect of district functioning and play a vital role in district leadership.

“The needs of our school communities have shifted,” says Niemann. “We need our CBOs to be really creative in budgeting, to be looking for ways to get to ‘yes.’ We need people who understand how their decisions or assumptions impact student outcomes and programmatic needs.”

Fiscal decisions cannot (and should not) be made in a vacuum. CBOs who understand the educational priorities of their district can facilitate programs and investments that support those priorities. CBOs who take the time to get to know department heads, employees and community members are better positioned to achieve buy-in on crucial initiatives – and better able to respond to needs and concerns voiced by front-line personnel.

That’s why superintendents are increasingly looking “more at leadership skills and qualities in their CBO candidates,” Niemann says. “They want someone who can really be student-focused and think big picture in terms of district needs.”



Start Before You Post: Define What *Your* District Actually Needs

Finding the right CBO begins with clearly defining your district’s priorities and challenges.

“The hiring landscape for a CBO position is really dependent on the local needs,” Niemann says.

Because California’s districts vary greatly in size, a CBO’s role and responsibilities can look very different district to district. In some districts, the CBO or associate superintendent supervises multiple departments and many employees. In others, the CBO personally handles district finances and human resources.

“I start with a ‘task and function’ audit before I even post a position, asking questions such as, ‘Do I need a technical expert to stabilize the books or a strategic Chief Operating Officer who can oversee a number of critical departments?’” says Stowe.

The CBO task and function checklist included in CASBO’s “Superintendent’s Guide to Hiring, Supporting and Developing Your Chief Business Official” (tinyurl.com/2fzekm2w) is a “great tool



CBOs are no longer just the “numbers” or “business” people in a school district.

BUILDING THE CBO-SUPERINTENDENT POWER PAIR



It is easier to build an individual's technical capabilities than it is to teach judgment, collaboration and trust-based leadership.

to ensure you are looking for the right type of leader for your district's current climate, as well as for the future," Stowe says. It provides a series of prompts you can use to identify the abilities and experience you need in a CBO candidate, as well as their likely responsibilities.

Write the Job Description – But Don't Let It Do the Hiring

A task and function checklist can also help you draft your CBO job description. However, it's important to not be overly specific or restrictive.

Although almost all superintendents would prefer to hire an experienced CBO with a proven track record of fiscal leadership and success, the reality is that many of California's most experienced CBOs have retired in recent years, with more poised to retire in the near future. (Thirty-two percent of CBO candidates who responded to CASBO's 2024 Value of Certification Study expressed an interest in retiring before 2029.) The majority

of CBOs interested in earning CASBO certification have less than five years' experience; many have fewer than two years' experience.

That's one reason why "we try to encourage our superintendents to not have such strict hiring requirements that it eliminates people," Niemann says. "We have really been encouraging districts to reduce hiring barriers to open up the candidate pool."

Years of experience or specific technical skills may not be as important as you think they are. An enthusiastic candidate who meshes well with the rest of your cabinet and is a creative, big picture-thinker may be a better fit for your district than an experienced business official with multiple certifications and few interpersonal skills. It is easier to build an individual's technical capabilities than it is to teach judgment, collaboration and trust-based leadership.

Recruit for Fit, Not Just Credentials

Searching for a CBO can be a delicate endeavor. "You want to find someone that you think would be great without headhunting your colleagues' right-hand person," Feliciano says.

The educational community in California is well-connected, and word spreads quickly. Letting others know that you're in the market for a CBO – and talking openly about the qualities that you're hoping to find – can maximize your chances of finding a CBO who is a good fit for your district. To ensure that you attract candidates who understand the unique complexities of California school finance, use CASBO's job board or work with organizations like the Fiscal Crisis and Management Assistance Team (FCMAT) or School Services of California.

Feliciano simply posted the job when he was in need of a CBO.

“My philosophy was to put it out there and see who showed interest, in hopes that someone really good would come to the table, which is exactly what happened with Tina,” he said, noting that she hadn’t even crossed his mind as a possibility because he thought of her as a superintendent at the time.

Douglas didn’t apply for the position right away; instead, she called the sitting LMSVSD CBO for more information. “I wanted to find out, one, why she was leaving, and two, what are the dynamics here?” Douglas said.

That kind of initiative is instructive. “A CBO’s role is really to work right alongside and in concert with the superintendent,” Feliciano says. “I’d be concerned if anyone interested in the role hadn’t done some homework on the front end to learn more about me and the district.”

Keith Butler, Ph.D., deputy superintendent for Torrance Unified School District (TUSD), used a thorough preinterview preparation process to vet the district before he applied. He read news articles and a year’s-worth of board agendas, watched recordings of school board meetings, and read comparative reports and bond offering statements, all in an attempt to get more information about the district and the degree of fit between him and district leadership.

“Districts have different flavors,” Butler says. “There’s got to be a fit between superintendent and CBO, between CBO and the district.”

Douglas says that Feliciano made clear that he and his cabinet were looking for “someone who’s humble, has a heart for kids, is hungry and eager for the work and who’s people smart.” That resonated with her – and yet, she still wasn’t sure she wanted to move to a new district, one much farther from her home. As she was considering her options, Feliciano sent her a text message affirming the

district’s interest in her as a candidate but encouraging her to consider and prioritize her needs.

“It was really those comments that sealed the deal for me,” she says. “I got a clear sense that this is a superintendent I would want to work for.”

Onboarding Is Leadership, Not Logistics

Ideally, your new CBO will have an opportunity to work with your outgoing CBO for a while before independently assuming the role. But even if that’s the case, it’s important to personally welcome your new hire and integrate them into the leadership team.

“The first 90 days should be all about integration over execution,” says Stowe,



A CBO’s role is really to work right alongside and in concert with the superintendent.

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BUILDING THE CBO-SUPERINTENDENT POWER PAIR



There may be big problems in a district, but if a CBO can get some little wins early, they won't just be the 'no' person.



the TUSD superintendent. "I'm very intentional about getting new CBOs out of the district office and onto our school sites. I want them to see the students, teachers and staff behind the line items on the budget."

Whenever possible, personally introduce the CBO to department heads and stakeholders. Build in time to get to know one another; to work most effectively together, you'll need to understand one another's personality and work styles. That's why Feliciano schedules a day-long, off-site retreat during the first three months of a CBO's tenure.

"The whole purpose of that time is to get to know each other," he says. "We're not talking about budget or strategic planning. It's totally relational."

Niemann recommends that superintendents explicitly encourage CBOs to prioritize relationship building during their first few weeks on the job.

"You can say something like, 'My intent is for you to use this time to work with your direct reports to visit people in the field. See what's going on with our sites. Meet our principals,'" she says. "It's not 'go out and see what's wrong' or 'do a needs assessment,' but get to know faces and where things are."

Set the CBO Up for Early Wins – and Long-Term Success

Outlining clear expectations for first priorities for a CBO is incredibly helpful. It's even better if you can cue up a few wins.

"Make sure your new CBO has a little bit of money to say yes to some things," Butler says. That way, if a site principal mentions, say, a need for a working security camera to discourage hijinks in a locker room, the CBO can actively demonstrate their intent to facilitate school operations.

"It's not buying favor; it's making something go through that makes a principal's life easier," Butler explains.

Nieman agrees that this approach can pay long-term dividends and contribute to a CBO's success.

"There might be big problems in a district, but if a CBO can get some little wins early, they won't just be the 'no' person. They'll establish some professional capital," she says.

Invest in Growth – or Risk Losing Your Best Leaders

You, your district and students will get the best results if you continually nurture your CBO's development.

Investing in their professional growth is particularly important for CBOs who are new to the role. Both Stowe and Niemann recommend pairing inexperienced CBOs with veteran mentors.

"Having a 'safe harbor' to ask technical questions, outside of our cabinet, is a game-changer for their confidence," Stowe says.

Niemann encourages superintendents to financially invest in additional training opportunities, as necessary, for CBO development throughout the CBO's tenure with the district. After all, "a good CBO is so valuable that they can handpick their jobs," she says. "They can very easily move to a bigger, higher-paying job."

When superintendents invest the time and intention to hire, onboard and support the right CBO, they don't just make their own lives easier – they create stability and trust that allows their entire district to function at its best. ■■■

Jennifer L.W. Fink is a freelance writer based in Mayville, Wisconsin.



What suggestions do you have for successfully recruiting a CBO? Email us at insight@casbo.org.

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 Interactive training on budget, agency creditability, fiscal solvency, internal and external rules, policies and regulations, account codes, vendors and technology.
 - › **April 14**
Charter Authorization & Oversight Micro-Certificate
 Gain actionable strategies for foundations, relationships, audit and oversight.
 - › **April 15**
Public Works 101: Bid to Build
 Perfect management of projects start to finish with the essential tools, compliance knowledge and budget strategies.
 - › **April 21**
Legal Aspects & Hands-On Accounting for Student Body Organizations
 Sales, organization and best practices, with special emphasis on how to maintain fiscal accountability, legal compliance and accuracy.
 - › **April 22 & May 5**
Contracting Strategies for Purchasing
 Explore the full contract lifecycle from development, negotiation and execution through management.
 - › **April 23**
CalSTRS / CalPERS: Retirement Concepts
 Clarify retirement systems and costs so you can better advise staff and avoid budget surprises.
 - › **April 29**
Standardized Account Code Structure: Basic Concepts
 Learn to use SACS as well as recent changes in the California School Accounting Manual.
 - › **May 1**
Standardized Account Code Structure: Advanced Concepts
 Address the big-picture implications and decision-making of SACS data and how it gets used.
 - › **May 5**
Payroll Essentials
 Become proficient in payroll-related computation from gross to net; federal, state and local statutes; rules and regulations; education code; labor law; and tax administration.
 - › **May 7**
Year-End Closing
 Receive tips for a smooth closing, clearing prior year accruals, setting up current year accruals and developing a year-end closing schedule.
 - › **May 14**
May Budget Revise
 Updates to the governor's January budget proposal, with discussion and explanation from the CASBO Governmental Relations team.
- Learn more or register:**
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