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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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The Long Clock

Every function in a district runs on a clock, and almost none of them are set to the same interval. Instruction is organized around a school year. Bargaining agreements run two or three years. Board terms run four years. District leadership can turn over three or four times before a single bond issue matures. Local Control and Accountability Plans (LCAPs) cycle in multiyear increments. Even the state budget, which drives so much of what we do, resets every June.

The business office does not reset. It carries bond maturities that run 25 or 30 years, pension obligations measured in careers and facilities that outlive the people who financed them. The office is also charged with recording retention schedules and handling succession planning for people who have not been hired yet.

That's the clock school business runs on.

As I read the content in this issue, it struck me that every article in these pages turns on something that only works because it was built years before anyone needed it.

Stephen M.R. Covey tells us you cannot surge trust at the last second. Ryan DiGiulio, who took Twin Rivers through a 12-day strike, says communication cannot begin during the strike. Ami Shackelford rebuilt San Diego Unified's position control system early in her tenure, well before a districtwide budget reduction turned accuracy into a survival question. John Baracy was walking Phoenix neighborhoods for a school bond at age 10. And our feature on learning pathways names the gap plainly. There is no defined route from accounts payable clerk to CBO, which means the person who will hold that chair in 2036 is being developed right now – or is not.

That's why so much of what CASBO is building this year matures slowly. Learning pathways, credentials, a coaching practice and statewide benchmarks are investments that will look unremarkable this fall but load-bearing in 10 years. We're doing that work deliberately, because the profession deserves architecture and not only advice.

So, here's the question this magazine edition left me with: What are you building right now that no one has asked

you for yet? Whose records, whose relationships, whose successor?

Every leader profiled in these pages is standing on a decision someone made long before the moment that made it matter. Our work is making sure that in 10 years, someone can say the same about us. ■■■

Tatia Davenport
CEO

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Tracy F.

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Finding Answers Together: The Power of the CASBO Community

At a recent regional networking event, I had one of those moments that reminded me why I continue to believe so strongly in the value of CASBO.

I ran into a payroll director from a neighboring county office of education. Many years ago, when I was serving as CASBO Eastern Section president, I had the privilege of presenting him with a scholarship to further his education. That scholarship was funded through the charity golf tournaments our region organized – events made possible by volunteers who believed in investing in the next generation of school business leaders.

Seeing him again reminded me that those investments have a ripple effect. The scholarship helped support his professional growth, but serving alongside so many dedicated CASBO volunteers shaped my own career as well (in fact, one of those volunteers is now my boss and mentor!).

Later that same evening, I connected with a Chief Business Official (CBO) from a district in the payroll director's county. She was trying to understand how a recent CALPERS reporting change would affect the interaction between her district's financial system and the county's payroll system. Like many of us, she was navigating a complex issue without all the answers.

When I learned she had never met her county's payroll director, I introduced them.

Within minutes, they were comparing notes, sharing perspectives and working through potential solutions together. Watching that conversation unfold, I realized it wasn't just networking – it was CASBO in action. A connection made years ago created another connection years later and, together, those relationships helped solve a real challenge.

As I think about the months ahead, that moment will stay with me.

Wherever I go, I hear the same questions from our members. Budgets continue to shift. Legislation evolves. Guidance changes. We're making important decisions while the landscape seems to change beneath our feet. As school business officials, that can be uncomfortable. We are planners by nature, and uncertainty isn't where we do our best work.

But I've learned that confidence doesn't come from having every answer. It comes from knowing where to find them.

That's where CASBO continues to make a difference. Through timely advocacy, legislative and budget updates, professional development and the willingness of members to share

their expertise, CASBO gives us the tools and community to move forward with confidence. I've relied on those resources throughout my career, and as president, I've seen firsthand the countless volunteers, staff and leaders who work behind the scenes to ensure members have the support they need to make the connections that matter.

The challenges we're facing won't disappear overnight. But neither will the strength of CASBO. Every conversation, every training, every committee meeting and every relationship adds to the collective knowledge of our profession.

Sometimes, confidence comes from a budget projection or a legislative update. Just as often, it comes from knowing the right person to call. I'm grateful for the CASBO community that continues to provide both. ■■■

Katie Hylton
CASBO President

CASBO Members In Action

Congratulations to the CASBO CBO Business Executive Leadership (BEL) cohorts who celebrated completion in May 2026 and gained eligibility to sit for the CASBO CBO Certification exam in July.



Jessica Lopez Photography

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Old Claims, Today's Budgets

Where AB 218 Stands and What Reform Could Mean for School Business

Six years after AB 218 reopened decades-old childhood sexual abuse claims, districts are absorbing the cost through JPA rates and reserves.



By Daniel Maruccia
Attorney, Lozano Smith

A small elementary district of about 800 students has never been sued for childhood sexual abuse. Even so, it has paid its former excess pooled liability fund nearly \$150,000 since Assembly Bill 218 took effect in 2020 – roughly \$87,000 of that in the most recent year – for abuse that occurred in another school district while the district belonged to the pool, which *it left about two decades ago*. On a \$15 million budget, \$150,000 is a teacher's salary and benefits.

A second district, with 4,200 students, paid \$389,000 for liability coverage in 2025-26, as compared to \$158,000 in 2017-18, a 146% increase.

Neither figure reflects a verdict against either district. Both reflect the same thing: Decades-old claims are being paid with today's money, and the bill is spread across the pool.

That's the part of AB 218 that gets lost in the litigation coverage. For school business officials, this is not primarily a legal problem; it is a risk-financing and multiyear-projection problem caused by a legal problem, and it reaches districts that have never received a complaint.

How the Deadline Disappeared

Code of Civil Procedure section 340.1 has been expanding in reach since it was added in 1986, when it gave victims three years to sue and reached abuse only within a household or family. SB 108

(Lockyer) dropped the family-member limitation in 1990 and set the framework practitioners knew for a generation: eight years from majority, or three years from delayed discovery, whichever was later. In 2003, SB 1779 (Burton) opened a one-year window for claims against non-perpetrator third parties. That window is the template the Legislature returned to in 2019.

For public agencies, though, the operative gatekeeper was rarely the limitations period. It was the Government Claims Act. Present a claim within six months or the suit is barred. Survivors coming forward decades later almost never had.

AB 218 (Gonzalez), Chapter 861, Statutes of 2019, removed both barriers at once. Effective Jan. 1, 2020, it extended the limitations period to 22 years from majority – age 40 – or five years from delayed discovery, whichever is later, and opened a three-year revival window running through Dec. 31, 2022, for claims barred by any statute of limitations, claim presentation deadline or other time limit. It authorized treble damages where the abuse resulted from a “cover up.” And it amended Government Code section 905(m) to eliminate the claim presentation requirement for these actions, retroactively and prospectively. That last change is the one that matters most to public agencies, because it revived cases that had failed at the procedural threshold before getting to the merits.

The Legislature has since gone further. AB 452 (Addis, 2023) eliminated the limitations period altogether for assaults occurring on or after Jan. 1, 2024 – prospective only, but the exposure window never closes going forward. SB 558 moved the pre-2024 regime into a new section 340.11.

The Projection Gap

The Senate Appropriations Committee did assess what the bill would cost. Its analysis identified three fiscal effects: unknown but potentially significant costs to state entities, unknown workload pressure on the courts and – the item that reached districts – “unknown, potentially major out-year costs to local entities and school districts to the extent litigation is successfully brought outside the current statute of limitations.” The committee went further. If payouts grew large enough, it warned, the measure could produce cost pressures on the state to stabilize a local jurisdiction or district. And districts might face costs *simply procuring liability insurance*, apart from any specific claim.

Six years on, that is a fair description of what has happened. What the committee never did was attach a number to it. The only dollar figure anywhere in the fiscal analysis was \$41.8 million – a General Fund appropriation cited to illustrate trial court funding pressure,

Old Claims, Today's Budgets

not district exposure. Against that, in January 2025, the Fiscal Crisis and Management Assistance Team (FCMAT) valued claims brought to date at \$2 billion to \$3 billion for local educational agencies, and has since projected the total could exceed \$4 billion.

What the Courts Have Settled

Punitive damages against a school district are not available.

In *Los Angeles Unified School District v. Superior Court* (2023) 14 Cal.5th 758, the Supreme Court held that treble damages under section 340.1 are primarily punitive and therefore barred against public entities by Government Code section 818. Thus, school district exposure under section 340.1 is bounded by compensatory damages.

Retroactive revival is not a gift of public funds.

In *West Contra Costa Unified School District v. Superior Court* (2024) 103 Cal. App.5th 1243, the First District Court of Appeals held that waiving the claim presentation requirement created no new substantive liability; the Legislature merely withdrew a condition it had imposed on its own consent to suit. The Second Appellate District (in *O.B. v. Los Angeles Unified School District* and the Fifth Appellate District (in *John Doe R.L. v. Merced City School District*), both published in 2025, have agreed. The Supreme Court has repeatedly denied review, with Justice Groban the lone vote to grant each time.

The practical consequence is that these cases are decided on ordinary negligence – hiring, retention and supervision – which is precisely the preexisting liability the gift clause opinions rely on. Defense turns on whether documentary evidence of notice and supervision still exists.

Reform Without a Bill

Reform is being negotiated, but not in public. As of early August 2026, no introduced active bill carries section 340.1 language. The effort sits with Speaker Robert Rivas and Senate President Pro Tem Monique Limón, with Los Angeles County pressing from outside after roughly \$4.8 billion in settlements. Public employee unions have joined the push this year. SB 577 (Laird), the last live vehicle, has been on the Assembly inactive file since Sept. 10, 2025. (The current session ended August 31).

One proposal, attributed to the California State Association of Counties, would require clear and convincing proof where abuse is alleged more than 20 years before filing, and would require plaintiffs filing at or after age 40 to show the entity had actual knowledge – a higher bar than the gross negligence standard SB 577 used. The same proposal would cap noneconomic damages at four times economic damages. The California School Boards Association (CSBA) has called caps the only sustainable approach, but others are doubtful that there is enough support in the Legislature to set them. FCMAT has recommended studying a September 11-style compensation fund with administered minimum and maximum awards. And SB 577's own content – adding demurrers to the motions eligible for defense cost recovery, barring refiling of stale dismissed actions and easing bond validation before judgment is entered – remains the most concretely drafted relief on the table.

What Business Officials Should Do Now

Districts should not budget for relief. The work in front of business officials looks like this: Model JPA rate increases and retroactive assessments into multiyear projections, remembering that excess

pools can assess former members for historic coverage years – the School Excess Liability Fund (SELF) has notified roughly 500 districts to expect \$300 million to \$400 million in supplementary assessments.

Reconstruct coverage history back to at least the mid-1980s and identify every pool the district belonged to.

Confirm contingent liability accrual and disclosure treatment with auditors, because Moody's has flagged uneven disclosure as a source of credit uncertainty. Audit records retention practices. And engage bond counsel before a judgment lands, because judgment obligation bonds are unsecured general fund debt validated under Code of Civil Procedure section 860.

As of Moody's November 2025 briefing to the state's debt and investment commission, no rating action had been taken as a direct result of AB 218. That picture is tightening. In July 2026, after the county office of education notified Los Angeles Unified that it met the statutory criteria for a lack of going concern designation, Moody's and Fitch downgraded the district – including the judgment obligation bonds it issued to pay these settlements – citing enrollment decline and cost growth rather than AB 218. FCMAT's chief executive treats a district emergency loan as a question of when rather than whether, and warns that the risk runs highest for the smallest districts. That is the prudent place to plan from. ■■■

*Courtesy of Lozano Smith,
a CASBO Premier Partner.*

This article was written prior to the end of the legislative session on August 31. Subsequent legislative developments are not reflected in this piece.



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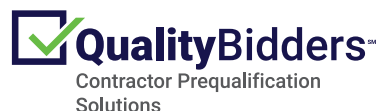
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Ami Shackelford Disrupts Old Processes to Build Better Systems

By Nicole Krueger



Jesse Karras Photography

If there's one thing that activates Ami Shackelford's inner disruptor, it's hearing someone say that's how things have always been done.

"My response is usually, 'How do you know that's the best way?'" she says.

As chief financial officer for San Diego Unified School District, Shackelford has built her career around challenging assumptions, solving complex problems and helping organizations rethink the systems that support their work. Whether redesigning financial processes, implementing new tools or helping teams adapt to change, her approach is rooted in continuous improvement.

"Curiosity has always been one of my biggest strengths," she says. "I enjoy figuring out how things work, why they work that way and whether there's a better solution."

She applied this approach early in her tenure at San Diego Unified, where she recognized an opportunity to improve the district's position control system and led the charge to design a solution. This effort required collaboration across finance, human resources and technology teams to create a more accurate connection between job positions, employees and budgets.

"It was a heavy lift, but something that was definitely needed," she says. The redesigned system ultimately made budgeting and position tracking much easier and far more accurate."

Shackelford developed her disruptive mindset after launching her career in corporate finance, working as a financial planner and analyst for technology-driven companies such as Boeing, Qwest Communications and Xcel Energy. Today, she applies that same problem-solving mindset to public education, where the impact is measured not by shareholder value, but by opportunities for students.

While helping guide California's second-largest school district through a time of significant financial challenges, she leads a cross-functional budget reduction effort designed to keep the impact as far away from classrooms as possible while improving processes and leveraging automation.

For Shackelford, success is measured not just in balanced budgets and improved systems, but in what those achievements make possible for students.

"My philosophy is that finance exists to support education, not the other way around," she says. "When reductions don't impact the classroom and students still

have opportunities – a field trip, a new textbook, keeping their favorite teacher – that is how I define success."

That philosophy also shapes her leadership style. While she remains passionate about moving quickly to solve problems, she recognizes that lasting change requires bringing people along.

"I don't like hearing someone is stuck," says the self-described cyber detective. "Let me help you figure it out."

At the same time, she adds, "I've learned over the years and at different districts that you can't move 100 miles an hour because you have to be respectful and acknowledge everyone has different perspectives and different speeds."

As a lifelong learner, Shackelford relies on her professional network – including the shared learning community she has found within CASBO – to help her stay on top of new developments, from emerging technology like artificial intelligence to evolving practices in school finance. For her, the work is never finished.

"You don't have to know everything," she says. "You just have to be curious enough to find the answer and committed to continually improving." ■■■

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John Baracy Blends Financial Expertise with a Commitment to Enhancing Student Success

By Julie Phillips Randles



Hope Harris Photography

For some, public finance feels like a tangled world of numbers, interest rates and balance sheets. But for John Baracy, managing director and head of the California Public Finance Group at Baird, supporting school districts is a lifelong calling rooted in the fabric of public education.

Introduced to school finance at a young age, his connection to public education runs deep. Baracy's father was a school superintendent in Arizona, providing an early window into the challenges and triumphs of district leadership and the financial challenges school districts face. At age 10, Baracy was walking the streets of Phoenix to campaign for a local school bond initiative for Arizona's largest school district.

While he set out to pursue a career in accounting and finance during college in Arizona, an internship at a boutique investment bank influenced his trajectory. Baracy discovered that public finance combined business skills, marketing, finance and accounting into a single, dynamic career — one with a tangible, public benefit.

Over a 30-year career, primarily in California, Baracy rose through the ranks at multiple acclaimed firms, sharpening his expertise and building relationships with school district leaders.

In early 2024, a unique opportunity drew him to Baird. Founded in 1919, Baird is an international employee-owned investment bank with a large capital base, giving the firm the ability to underwrite up to a \$17 billion bond financing on any given day (as of June 2026.) While the firm had been underwriting bonds for California school districts for over 20 years and established a wealth management footprint in the state in 2007, it lacked a dedicated local public finance office.

Stepping in to manage and grow Baird's California and West Coast public finance group, Baracy opened the firm's first local public finance office in February 2024. While management is part of his role, his true passion is working directly with districts to underwrite bonds for California school districts with critical capital needs.

Today, Baird boasts over 85 employees across seven California offices and is a top-five negotiated senior/sole managing underwriter for California K-12 issuers (by number of issues, par amount or both*) since opening its public finance office in 2024.

What sets Baird apart is its large capital base and diverse investor distribution network. These robust and diverse relationships help drive down interest rates, saving valuable dollars for local districts.

Baracy has been aligned with CASBO for over two decades. He serves as the chair of the Associate Member Committee and helped bring Baird into the CASBO fold as a Premier Partner. Through CASBO, Baird supports California's K-12 education community by hosting seminars and speaking engagements to keep members informed of an ever-changing marketplace. Baracy is a former Coalition for Adequate School Housing (CASH) board member, and has been an education foundation board member for his public school district in Santa Monica for over 10 years.

"I've been really impressed with CASBO's efforts to keep members informed on legislative advocacy, financial matters and AI, and how these topics will impact them," Baracy says.

From his angle, the work is all about students' futures. "We get to see the benefit of public education and the ways new school facilities can transform learning environments to help students attend college and become future leaders in an evolving world." ■■■

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Susana Lopez

She Sees Financial Stewardship as a Framework for Serving Students

By Julie Phillips Randles

Most Chief Business Officials (CBOs) know what school finance looks like from the cabinet table. Susana Lopez also remembers what it looks like from the accounts-payable desk.

Her unusually broad perspective is one reason her colleagues pay attention when she talks about budgets, leadership or the future of California school finance. Lopez began her career as a student worker and clerical substitute in Corona-Norco Unified School District, then moved through a succession of increasingly complex roles: account clerk, accountant, accounting supervisor, fiscal services director, assistant superintendent and CBO. Along the way, she handled everything from attendance reporting and categorical programs to cash-flow projections, labor negotiations and districtwide operational strategy.

In other words, Lopez didn't simply learn how to maintain a district budget. Instead, she's learned how decisions travel through an organization and affect the people responsible for carrying them out.

Today, as the CBO for Moreno Valley Unified School District, Lopez oversees a \$676 million general fund budget; a division of more than 500 employees; and operations ranging from fiscal services and purchasing to transportation, nutrition, facilities, risk management and maintenance. But her results point to something broader: A leader who sees financial stewardship not as an end in itself, but as the structure that allows schools to serve students well.

That service-minded approach extends beyond her district. Lopez has

held multiple leadership roles within CASBO, including her current position as Eastern Section vice president-network. She also teaches other school business professionals, leading courses in budgeting, school finance history, school accounting and resource allocation. Her participation in CASBO's Business Executive Leadership (BEL) program reflects a sustained commitment to developing the next generation of leaders.

Her real mission is not to help find numbers but to help colleagues understand the numbers, explain them plainly, build sound systems and help others become capable enough to lead. Even her recent professional presentations at CASBO Con focused on using data to tell a story and connect financial information to better decisions.

“The greatest reward from my involvement is seeing individuals I mentored be promoted to directors and CBOs.

We sat down with Lopez to explore that message.

What's something you thought you knew that you found out you were wrong about?

I thought the job would get easier over time! Even though I gained experience, there are still challenges to face on a regular basis.

You serve as the CBO for Moreno Valley USD, but you also wear several other influential hats, including CASBO Eastern Section vice president-network. How do these regional leadership roles inform your daily work at the district level?

I'm a big believer and advocate for relationship-building and networking. This position allows me to stay connected with colleagues and has helped me build a large network of resources.

I have been involved with CASBO for over 20 years at many levels. Staying connected through CASBO and through the relationships I've built at a regional level gives me confidence because I know I have a broad support system in place.

You've led the CASBO School Business University (SBU) Budgeting Basics 101 course. Why is a foundational grasp of California school finance so critical right now, even for nonfiscal administrators?

Many districts are dealing with challenges that put a strain on budgets, including declining enrollment, aging facilities and overall rising costs. Budget Basics 101 is a great introduction to school budgeting, and can also be a solid refresher course.

Fiscal stability is a shared responsibility between fiscal and nonfiscal administrators; having a strong budget understanding is essential because

budget decisions directly impact student outcomes. This course ensures that participants leave with tools not only for budget development, but for monitoring and communicating it. Fiscal stability is needed to ensure that our programs are sustainable and aligned with our student needs.

District budgets are moving targets with constant regulatory updates. What's your advice for business office staff on how to stay compliant, while remaining agile when monitoring financial projections against actual results?

Don't wait until reporting periods arise to review your budgets. Instead, monitor them constantly so that you know where you stand and can report to your team if adjustments are needed.

The SBU course emphasizes the "history of school finance" as a learning objective. How does understanding where California school funding has been help school leaders make better, more strategic decisions for the future?

Understanding the history of school finance in California helps us better prepare for the future. Funding has always been cyclical. When the state economy does well, district revenues do well, but when the economy slows down, district revenues slow down.

One of the session topics covers budget documents and presentations. School finance can feel like a foreign language to parents, community members and even school boards. What is your secret to translating dense fiscal data into a clear, transparent narrative for stakeholders?

Budget discussions need to take place consistently – they shouldn't only take

place during budget adoptions or interims.

I focus on breaking down complex numbers and incorporating visuals. Often, I ask nonbusiness staff to review presentations to get feedback and check for clarity and understanding.

Consistency is really the key to presenting fiscal information.

The Local Control and Accountability Plan (LCAP) ties funding directly to student outcomes, making collaboration between the business side and the educational side essential. How can CBOs better bridge the gap between budgeting and LCAP goals to ensure fiscal stewardship actually drives student success?

Ongoing collaboration with your educational services team is a must! In our district, we spend a significant amount of time working together.

We attend county LCAP meetings as a team to ensure we're aligned and hearing the same information. We joke about adding workstations for our educational services team in the business department because we work so closely together.

It truly is a tight partnership, based on an understanding that budget and LCAP go hand in hand.

Your upcoming course promises to give participants a step-by-step road map they can apply immediately in the workplace. If you could give a new CBO or administrator just one foundational rule for building a resilient budget development process from start to finish, what would it be?

I'm a firm believer in transparency. When it comes to budgeting, you can't have any surprises.

Be completely transparent about the assumptions you are using and what

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Susana Lopez

“Ongoing collaboration with your educational services team is a must!”

multi-year projections look like, even going beyond the required third year. Keeping the board, superintendent and cabinet well-informed every step of the way is essential because clear, consistent communication is the key to a successful budget development process.

You're also an instructor for CASBO's Business Executives Leadership Program (BEL), leading content related to the Local Control Funding Formula (LCFF). What was behind your interest in being involved in this professional learning opportunity? Why do you recommend it to colleagues?

I have always had a passion for teaching. When I was approached by one of my mentors about this opportunity, I accepted without any hesitation.

Being involved with the program allows me to contribute to future CBOs foundations. The greatest reward from my involvement is seeing individuals I mentored be promoted to directors and CBOs. That's an ongoing joy of this work.

I recommend the BEL program to colleagues because it truly prepares you for the job. The sessions show you what being a CBO is really like by working through real-life situations. Best of all, you walk away with a strong network of peers and mentors who are there to help you every step of the way. ■■■

Julie Phillips Randles is a freelance writer based in California.





FALL LEARNING CALENDAR

Details and
registration at
casbo.org/calendar

Fall Learning Calendar

VIRTUAL PROFESSIONAL DEVELOPMENT

- › **October 1**
Standardized Account
Code Structures:
Advanced
- › **October 13**
Public Works: Bid to Build
- › **October 20**
Legal Requirements for
Leaves of Absence
- › **October 21-23**
School Business Payroll
Certificate
- › **October 22**
Budgets: Basic
Development
- › **October 27**
Procurement Strategies:
Bids, RFPs & Compliance
- › **November 3**
Vendor Reporting:
Setup to Filing
- › **November 13**
Purchasing: Contract
Strategies

- › **November 18**
Budgets: Advanced
Development &
Management
- › **November 18-20**
School Business
Payroll Certificate
- › **November 19**
Vendor Reporting:
Setup to Filing
- › **December 2**
Standardized Account
Code Structures: Basics
- › **December 4**
Vendor Reporting:
Setup to Filing
- › **December 10**
Standardized Account
Code Structures:
Advanced

IN-PERSON SECTION FALL EDUCATION

- › **September 25**
Central Section
- › **September 28**
Tri-Counties
- › **October 2**
Eastern #1
- › **October 9**
North Bay
- › **October 16**
Sacramento
- › **October 16**
San Diego/Imperial
- › **October 16**
Shasta Cascade
- › **October 16**
Southern
- › **October 21**
Eastern #2
- › **October 22**
Central Bay
- › **October 28**
South Bay
- › **November 5**
San Diego/Imperial



PROFESSIONAL DEVELOPMENT

From Afterthought to Operational Strategy

By Jennifer L.W. Fink

Where did you begin your journey toward a career in school business?

Melissa Elwood, assistant superintendent of business services at Corona-Norco Unified School District, started as a junior accounts payable clerk.

Richard De Nava, assistant superintendent business services at San Bernardino County Superintendent of Schools, took his first steps toward school business leadership at the U.S. Military Academy. Though he didn't know it at the time, the leadership training he received at West Point – and the skills he honed commanding troops in Afghanistan during the global war on terror – allowed him to start his formal career in school business as a director of purchasing.

"My first CBO, when he hired me, said, 'Look, I want you to take on this position as a director because I need a leader. What I do not need is somebody who knows the job but doesn't know how to lead or work with people. I know you'll pick up the technical acumen on the job,'" De Nava says.

At that point, De Nava knew virtually nothing about school purchasing. Or school business. His CBO pointed him down a path of professional learning.

"Number one, you've got to go to your follow job alike meetings," De Nava recalls. "Number two, you have to join CASBO. I'm going to send you to the annual conference."

Finding your way forward in school business isn't always so simple. The paths to a career in school business are many and diverse. Some people start in facilities management, others in accounting. Some come from corporate America and some, from the education side of the house. Each individual brings a unique skill set, as well as unique learning needs. Each requires support and education to realize their potential.

And yet, "not long ago, professional development across many industries was treated as a 'nice to have' – something funded only if there was room in the budget at the end of the year," says Kristen Gates, CASBO's online learning director. If anyone got professional

development, it was usually individuals at the executive level.

That's starting to change.

"We're seeing a shift as more districts make professional development part of their core operational strategy," Gates says. "The focus is now on building capacity at every level."

Increasingly, school districts are realizing that building individuals' capacity strengthens the functioning and operation of the district as a whole. But mapping out the school business learning journey remains challenging for many.

That's why CASBO is investing time and attention to developing school business learning pathways – and encouraging CBOs to do the same.

Learning Pathways Provide Direction

Historically, most learning within school business occurred on the job. Mentors who spotted potential in promising employees provided informal education and recommended (and often supported)

“ Learning pathways can help them identify their next best step based on their role, goals and preferences.

formal professional development opportunities. Career pathways were largely informal, and progression in a school business career depended heavily on personal motivation. CBOs devoted most of their future-planning efforts to the district at large without giving much thought to the professional development of the individuals working within business services.

Contrast that to the military environment De Nava experienced as a young man. The military has very clear career ladders, with well-defined benchmarks for promotion. Individuals take on additional responsibilities as they gain rank, and the military invests considerable time and training in preparing individuals to assume greater responsibility. Recruits generally understand what is required to advance, and leaders are expected to support the development of those under their command.

School business, of course, operates within a completely different environment than the U.S. military.

Facilitating the professional growth and advancement of each employee, however, should be a priority of school business leaders as well.

Right now, it's difficult for CBOs and others in school business to easily visualize a clear learning pathway. There's no clearly defined route from, say, accounts payable clerk to CBO. Multiple educational opportunities and possible career pathways exist, but it's challenging for individuals to pick a path forward when they don't have a full picture of the possibilities.

Enter learning pathways.

"I like to think of learning pathways as the map at a trailhead," Gates says.

People beginning a hike typically know where they want to go, but a glance at the trail map may also reveal an intriguing destination that they hadn't yet considered – one they may decide to pursue when they realize it's closer than they thought. Trail maps also usually show more than one route to get to the same destination, and hikers can choose the path that best fits their abilities, interests and goals.

In the same way, career pathways can help individuals in school business step forward confidently.

"A lot of people know they want to grow, but they aren't sure where to start or which learning opportunity is the right fit," Gates says. "Learning pathways can help them identify their next best step based on their role, goals and preferences."

Learning pathways can (but don't have to be) formalized. CASBO is currently working to help members more clearly understand possible paths forward by suggesting next steps for those who complete a course, workshop or certificate.

"We want members to see how our professional learning opportunities connect," Gates says. "You'll start to see



more messaging that will help school business professionals ask and identify, *Where am I today? What do I need next? Which of these opportunities make the most sense for me?*”

CBOs can provide a similar service within their districts by discussing and sharing learning opportunities with others in school business. School business leaders can also offer in-district professional development and career guidance.

Annual employee evaluations are a great time to discuss learning pathways, says Elwood, Corona-Norco Unified’s assistant superintendent of business services.

“When we identify a knowledge gap or challenge, we look to find something to help close that gap,” she says.

If someone is struggling with Excel, additional Excel training may be in order. If someone is interested in improving their communication skills, they may be a good candidate for CASBO’s School Business Communications Micro-Certificate, a six-module, self-paced program that helps participants overcome conflict avoidance and approach high-stakes conversations with courage and strategy. An employee who is interested in artificial intelligence (AI) can be encouraged to learn more about AI tools and best practices.

How to Find (and Map) Your Learning Journey

Start Simply

You don’t need to know your final destination to begin a learning journey.

“When we identify a knowledge gap or challenge, we look to find something to help close that gap.”

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“CASBO’s here to help people see what’s possible, choose a next step and build a learning journey that fits their goals.”

“Take the pressure off yourself to have your whole learning path or career journey mapped out,” Gates says. “School business careers are rarely linear, so you don’t necessarily need a clear picture from start to finish. You just need to drill down to one question: *What do I need next?*”

If you don’t have a clear answer to that question, ask a colleague who’s familiar with your career goals and skills. Or you can simply pick an educational option that looks interesting.

“Start with something as simple as a 30-minute 101 course,” Gates says. If you enjoy that course, consider one or more of the recommended additional learning opportunities for continued growth. (If you didn’t like that first course you tried, try something completely different next time.)

Seek Input from Your Team

“Ask questions along the way,” De Nava says.

Your co-workers and colleagues may have a better understanding of your strengths and weaknesses than you do – and they may be aware of professional development opportunities you aren’t.

Your supervisor can also help you contextualize your learning journey. Together, discuss how your skills serve the district’s broader goals. Brainstorm areas of growth based both on your personal interests and the needs of the district. Identify learning opportunities that will help you stretch your abilities and improve your service.

Consult a Guide

Sometimes, a map isn’t enough.

That’s especially true mid-journey. As obvious as a trail may appear on the map at the trailhead, deep in the woods, it’s sometimes hard to tell if you’re meant to continue straight ahead or follow the path veering off to the right. Alone, you’re likely to guess. With an experienced guide beside you, you’re much more likely to stay on your intended path.

A mentor – an experienced individual who’s traveled the path before you – can help you stay on track. If you haven’t yet found a mentor, consider CASBO’s Mentor Program, which pairs experienced leaders with emerging professionals.



Seize Opportunities

“Don’t wait for someone to anoint you,” Gates says. “If you see a good next move, pursue it.”

Say “yes” to opportunities that make you a bit uncomfortable; growth rarely happens in our comfort zone. Take advantage of professional development sessions offered by your district, professional organizations and county office of education. And if you spot an opportunity you’d like to pursue but aren’t sure if your district will support you, reach out to CASBO.

“For select leadership programs, CASBO provides learners with customizable letter templates to request support from their CBO or superintendent,” Gates says.

As the profession works to create clearer, more intentional pathways for school business professionals, CASBO is committing to helping members navigate the opportunities that exist now and identify the resources and next steps that make sense for them.

“CASBO’s here to help people see what’s possible, choose a next step and build a learning journey that fits their goals,” Gates says. ■■■

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



What’s the next step on your career learning journey? Share your advice at casbo.org/linkedin.



TAKE THE NEXT STEP ON YOUR LEARNING JOURNEY

Wherever you are in your school business career, CASBO offers opportunities to continue your learning, build your network and prepare for what’s next. Start by making sure you’re connected to everything your membership offers.

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Your learning journey doesn’t have one path. Start with the opportunity that meets your needs today, and let CASBO help you build toward where you want to go next.



FROM TRUST TO TRACTION

Building the Relational Capital That Powers Effective Districts

By Jennifer L.W. Fink

More than 70% of Americans don't fully trust public schools.

According to a 2026 Gallup poll, just 27% of Americans have a "great deal" of trust in public schools. Trust and confidence in U.S. institutions – from the federal government to banks, media and the medical system – is approaching record lows.

There are (a lot of) reasons for the breakdown of trust in civic life. But distrust is now common at the personal and professional level as well. Only 21% of U.S. employees strongly agree that they trust the leadership of their organization, according to Gallup. There's also a significant gap between the number of executives who say they "highly trust" their employees and employees who say they feel highly trusted (86% vs. 60%), according to PricewaterhouseCoopers.

Suspicion and skepticism have become the default mode for many people today, and that's not good for business.

"Research shows that people perform far better when they're trusted," says Stephen M. R. Covey, author of *The Speed of Trust: The One Thing That Changes Everything* and keynote speaker at CASBO Con 2026.

Trust, Covey says, is far more than a soft skill; it's a business asset.

"When you don't trust people, things take longer and cost more. You have to take steps to compensate for that lack of trust," he says. "When you do trust people, you move fast. There's a speed to trust."

New (and experienced) Chief Business Officials (CBOs) often focus on their most obvious roles and responsibilities: financial planning, presenting fiscal information to the board, overseeing district operations and supporting bond measures. But if trust is a strategic asset, helping the district build that asset is also part of the CBO's role. Through their relationships, communication and everyday decisions, CBOs can increase

the level of trust within a district, building a reserve that allows people to work together more effectively – and efficiently.

The CBO's Role in Building Trust, Engagement

"Distrust is contagious," Covey says. "So, if we as leaders don't intentionally and deliberately take steps to build trust, grow it and establish it, there tends to be a drift towards more mistrust and distrust."

At this point in time, more people are inclined to assume that you don't care about them or have their best interests in mind than to assume that you'll treat them fairly. A CBO who doesn't intentionally cultivate trust is walking up a metaphoric hill and stumbling over invisible barriers.

That's especially true for CBOs who accept positions in districts that have previously experienced mismanagement,

FROM TRUST TO TRACTION

“You can’t surge trust at the last second. Be willing to give trust.

corruption or other breakdowns of trust between staff, administration and the community. Frequent turnover can also negatively impact the “trust climate” of the district, as individuals may be reluctant to get to know or rely on co-workers who may leave.

In contrast, stable districts staffed by dedicated professionals who respect one another and work together to achieve audacious goals are usually characterized by a culture of trust. If you’re fortunate enough to work in such a district, you begin with an advantage: People there know trust works. They’re comfortable delegating work because they know the work will likely be completed and done well.

They bypass much of the second-guessing that occurs in many districts when leadership announces new initiatives because new initiatives in such districts don’t usually come as a

surprise; district leaders involve and inform stakeholders throughout the planning process, and staff have learned that leaders typically do what they say they’re going to do.

Trust may be the norm in some districts, but it’s never a given. Whether you work in a high-trust or low-trust district (or somewhere in between), your actions will determine whether you cultivate trust or mistrust. And the results of your actions will directly impact district functioning.

Consider labor negotiations, an essential and unavoidable part of school business.

“Union/management negotiations are typically filled with mistrust. That’s one of the reasons they take so long,” Covey says.

In districts where trust is consistently cultivated, negotiations are often faster (and more pleasant).

Kent Kern, a retired superintendent who previously led San Juan Unified School District, says that labor negotiations became easier over time as district leadership regularly and transparently shared financial information with union members – and teachers and staff learned via experience that they could trust leaders’ numbers and intent.

“With trust, you don’t start out miles apart,” Kern says. “Over the years, I saw that our starting points were much closer together than they were initially.”

It takes time – and consistent effort – to build trust.

“You can’t surge trust at the last second,” Covey says.

Ryan DiGiulio, chief business officer of Twin Rivers Unified School District, agrees. He started at Twin Rivers in 2023 and recently helped the district navigate a historic 12-day teachers’ strike and secure a two-year contract agreement.

“You can’t start communication during a strike. You need to build that up



over years,” says DiGiulio. “For me, it’s all about building trust from day one.”

Take Action

Trust may be intangible, but building it is active work. Here’s how you can cultivate trust and, in the process, expand capacity:

Start with Yourself

People won’t trust you if you’re not trustworthy.

Begin with a self-assessment.

“Look in the mirror and ask, ‘Is it smart to trust me?’” Covey suggests.

Be honest: Do you follow through on your promises? Show up authentically? Admit your mistakes? Fudge facts or gloss over missteps? Share information transparently? Credit others appropriately?

The answers to those questions should give you both a pretty good sense of your current level of trustworthiness and some ideas for improvement.

You should also assess your capacity to trust.

Some of us are naturally more trusting. (Often, due to a history of positive, nurturing experiences.) Others are more reluctant to release control or trust others. If you believe that others can only be trusted after they’ve demonstrated the ability to successfully complete a task, you have some work to do.

“There’s a risk to trusting people. But it’s also a risk to not trust people,” Covey says, noting that leaders who don’t entrust their colleagues and staff with responsibilities miss out on both the speed of trust and the creativity others may bring to projects.

Forge Relationships

“Treat everybody well,” DiGiulio says. Consistently and across the board.

“People see how you treat others, and that will permeate throughout the organization,” DiGiulio says.

If you’re new at a district, consider scheduling one-on-one meetings with colleagues and staffers – ideally, in their workspace or at an off-site location.

“I like to go to people because I feel they’re more comfortable in their space,” DiGiulio says.

Don’t use this time to establish professional expectations or list your past accomplishments. Focus on simply connecting, human to human. Look for shared interests or experiences. Aim to come away with a better understanding of each person as an individual, instead of simply as “an employee” or “board member.”

Plan (and prioritize) regular relationship-building meetings with important stakeholders.

Kern, the former superintendent at San Juan Unified, used to meet once or twice a month with the president of the teachers’ association and another person of her choosing at a local restaurant. Eventually, one of his CBOs did the same thing.

“There were no topics that were off limits,” Kern says. “Over time, that helped us so much. When you break bread with people, the conversation changes a little bit. I truly believe that time was so well-invested.”

Extend Trust

When you have a good understanding of others’ abilities and interests, it’s time to start extending trust.

Covey delineates between what he calls “smart trust” and blind trust. Smart trust involves an assessment of the situation, risk and the credibility of the person. “Be deliberate and intentional,” he says.

Whenever possible, entrust people with projects that may be at (or just

Continue Your Learning

Building trust requires more than understanding its importance. It takes reflection, practice and continued learning. These resources can help:

CASBO Resources:

School Business Communications Micro-Certificate. Learn a framework you can use to foster connection and trust. A cohort-based, six-module, self-paced course. Earn 6 CEUs upon completion. (casbo.org/cert/sbc-microcert/)

Connecting with Cabinet and School Board to Influence Decision-Making. Intended for school transportation leaders, this CASBO SBU course includes strategies to build trust with cabinet members. (learn.casbo.org/courses/64609)

Mastering Resilient Communication. Learn how to maintain your composure in stressful situations and adapt communication strategies for various audiences in this 30 minute self-paced course. (learn.casbo.org/courses/62479)

Books:

The Speed of Trust: The One Thing That Changes Everything, by Stephen M. R. Covey with Rebecca R. Merrill

The Five Dysfunctions of a Team: A Leadership Fable, by Patrick M. Lencioni

FROM TRUST TO TRACTION



Hope Harris Photography

beyond) the outer edge of their current capabilities. Discuss the projects' intended goals, share all necessary resources and establish check-ins, but don't specify the method.

"That's the exciting thing about extending trust and giving someone the leeway to figure it out. You get to see their creativity and excitement, and

they develop and gain new skills and therefore, their ability to contribute to the future increases," Covey says.

Note that extending trust does not entail eliminating accountability. During your scheduled check-ins, the one entrusted with the task should report their progress against the goal. Together, discuss encountered challenges and opportunities. Resist the urge to take over when problems arise; micro-managing may get the project done more quickly but erodes trust and employee confidence. Instead, encourage reflection and brainstorming and offer resources and support.

"Be willing to give trust," Covey says. The dividends, he says, go far beyond completed tasks or progress toward strategic goals.

"When you trust others, they tend to receive that trust and return it," he says.

Trust given can grow exponentially in an organization.

Be Direct. And Kind.

Clear, honest communication is essential to trust.

You can't pretend to trust someone, and you can't afford to ignore conflict. Trust does not grow where dishonesty lives.

"An over-insistence on niceness is a trust eroder," says Doug Feliciano, superintendent of La Mesa-Spring Valley Schools, noting that Pat Lencioni, author *The Five Dysfunctions of a Team*, calls "false harmony" one of the "most dangerous dysfunctions."

As a CBO, you can set and stage and standard for straightforward, honest communication. Share your thoughts and concerns with others via simple statements and non-emotional language. Surface uncomfortable but necessary topics and encourage others to weigh in.

"We need to be upfront," Feliciano says. "You need to be able to say, 'I feel

like you're talking down to me' or 'I'm really bothered by...'"

CBOs should also take responsibility and model repair.

If you make a mistake, inadvertently share inaccurate or incomplete information, or speak or act unkindly, admit your error as soon as possible.

"Lay it out there openly," Kern advises. If new additional information has come to light, share it, without spin.

Steps like that go a long way toward building trust – a fact Kern learned via experience.

"When I took on the superintendent's role, I learned something had happened before me that contributed to a difficult situation. I met with the executive director and president of the teachers' association and said, 'This is what happened. I take responsibility for it. It's

my job now to make sure we rectify this situation.'

"Years later, the director told me, 'Kent, when you took ownership of that, even though it wasn't directly yours, it showed us you were going to be trustworthy.' That was a foundational block in building a relationship that was very successful over the next 10 years."■

CBOs in Action is an ongoing series focused on the the responsibilities of CBOs beyond daily operations.

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



How do you build trust with your team? Email us at info@casbo.org.

“ We need to be upfront. You need to be able to say, ‘I feel like you’re talking down to me’ or ‘I’m really bothered by...’ ”



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Weathering Storms with Resilience

3 Experts Offer Advice on Helping Teams Navigate Today's Pressures

By Nicole Krueger

The road ahead is looking rough for California school districts.

District leaders face overlapping fiscal pressures, political tensions, staffing challenges and rising community expectations – often while being asked to make consequential decisions with fewer resources and little margin for error.

In that environment, it's not enough to simply endure one crisis after another. Leaders need to develop the capacity to absorb shocks, adapt thoughtfully to change and continue to serve students without exhausting the people doing the work.

"Business and operations teams are being asked to navigate an unprecedented combination of challenges," says Jennifer Stahlheber, deputy superintendent of business and operations for Rocklin Unified School District. "Business leaders are tasked with making difficult recommendations that ensure today's decisions do not compromise the district's ability to serve students in the future."

When confronting difficult financial realities and other external pressures, creating a culture of safety is critical, says mental health counselor and resilience author Kristin Souers.

"If we are a caring and committed staff, then that message passes onto our students and families," she says. "If we work in a toxic culture of petty, passive-aggressive and negative behaviors, then odds are nobody feels safe, let alone that they are in a healthy place to work, teach or learn."

But resilient districts also need systems that allow information, responsibility and problem-solving to move throughout the organization.

"District leaders and educators working in schools often have different perspectives on how efforts are unfolding, making it important to create regular opportunities for information to move in both directions," says Alix Gallagher, director of educational policy and outcomes for Policy Analysis for California Education (PACE).

Ultimately, Stahlheber says, "resilience comes from focusing on what we can control: Making thoughtful decisions, communicating with integrity, supporting one another and always keeping students at the center of our work."

In the following roundtable discussion, Souers, Stahlheber and Gallagher explore what it takes to build resilience within school districts before the next crisis arrives.

What does strategic resilience mean for a school district?

Stahlheber: Resilience means resisting the urge to react out of fear or urgency. Instead, it requires taking a thoughtful, strategic approach – finding efficiencies, eliminating redundancies and identifying savings before reducing programs or services whenever possible. Those conversations are rarely easy, particularly when they affect employees or are unpopular with the community. However, resilient leaders understand that making difficult decisions today, even when uncomfortable, is often what allows districts to preserve high-quality educational opportunities and remain financially stable for years to come.

Weathering Storms with Resilience

Gallagher: One thing our research has reinforced is that resilience is often discussed as a characteristic of people or organizations. Our research instead suggests that resilience is built through systems. Across our studies of district improvement, we consistently see that districts are better positioned to adapt when they have clear priorities, invest in communication across levels of the system, create opportunities to learn from implementation and build shared ownership of improvement. Investing in the necessary structures and process can be difficult to prioritize, particularly during periods of fiscal constraint, but they are what allow districts to navigate uncertainty without losing sight of their long-term goals for students.

What distinguishes a resilient team from a team that is simply enduring one crisis after another?

Stahlheber: Resiliency is built when people know their perspectives are valued and that solutions have been developed through thoughtful discussion that considers multiple viewpoints. Even when every suggestion isn't implemented, employees who know their input is genuinely sought and

respected are more invested in the outcome and more willing to contribute to future solutions. They develop confidence that they can rely on one another and be part of overcoming challenges together.

Resiliency is also strengthened through honest reflection. When things don't go as planned, it's important to have open conversations about what happened, what we learned and what we could do differently next time. Focusing on learning rather than assigning blame creates psychological safety and gives people the confidence to take calculated risks, innovate and step outside their comfort zones. They know that mistakes become opportunities for growth rather than reasons for punishment.

Souers: At the forefront of trauma-invested practices is creating and sustaining a culture of safety. A culture of safety is one that promotes safety (both physical and emotional), predictability and consistency. It is such an essential component and one that deserves consistent attention and permission for refinement as life evolves. If you don't have it, nothing you do will work.

The adults in the district need to collectively come together and commit to the development and sustainment of a strong



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culture and climate – one that sends a message to their staff, students and families of, “I see you and you matter, and you belong here” for all who cross those thresholds.

What is the role of coherence in making a district system more resilient?

Souers: One of the biggest struggles in education is consistency. Even within districts, there are inconsistent practices that are contradicting other messages and expectations. This can be very confusing and can contribute further to the problem.

Gallagher: Coherence helps leaders align priorities, resources and authority around a shared direction, creating a framework for deciding how new opportunities fit into the district’s broader strategy rather than treating each as a separate initiative. It is also about helping people throughout the system understand how today’s work fits into a longer-term strategy for improving teaching and learning. When leaders make those connections visible, educators are better able to adapt to change without losing sight of where they are headed.

How do business leaders help a district stay steady when financial realities force difficult conversations or unpopular decisions?

Souers: I’m encouraging districts to lead with these themes: assume positive intent, seek to understand, approach with curiosity and wonder, and refrain from judgment. If we are approaching our challenges riddled with assumptions and negative mindsets, we will only be further contributing to the problem.

It would be beneficial to create community agreements centered around these themes. Community agreements are a more evolved set of expectations that ensure we are inclusive of all. When we establish a set of community agreements, we have a set of expectations in place that help guide behavior and performance. I encourage teams to review these at the start of every meeting and collectively agree to work collaboratively and positively when addressing district concerns. We are all in this together and will be much more effective when we work intentionally and kindly with one another.

Stahlheber: Business leaders help a district stay steady by grounding decisions in facts rather than emotion. Financial data tells an important story, and it is our responsibility to present that information clearly, accurately and transparently, so that stakeholders understand not only what decisions are being made, but why they are necessary.

Equally important is making complex financial information accessible to the broader community. School finance can be complicated, and if people don’t understand the challenges,

it is difficult for them to understand the decisions. By communicating openly, using clear data and explaining the long-term implications of various options, business leaders help build trust even when the decisions themselves are unpopular.

How can business and operations leaders communicate fiscal constraints clearly without creating fear, confusion or distrust among staff and community members?

Souers: Safety isn’t just about adding in more security measures to our settings. It is also about knowing our community, knowing our students and attuning to their needs. We need to be listening to what others are saying and looking for the meaning behind the message. We need to ask for input and genuinely involve others and not make decisions in silos. We need to be ready and prepared to have hard conversations and ask hard questions. We also need to be modeling the very behavior we expect from others.

Stahlheber: Building trust during challenging financial times starts with transparency. Business leaders need to communicate early, share the data behind decisions, explain the available options and be honest about the constraints the district is facing. Even when people disagree with a decision, they are more likely to trust the process if they understand how and why it was made.

How can leaders prepare teams to navigate backlash, conflicts or public criticism?

Souers: It seems to me that there is a growing majority of education professionals who are struggling with wanting to support each and every student in their building. We must work together to develop and foster resilience not only in our students but also in the adults. If adults aren’t taking care of their own health and wellness, we run the risk of burnout, high turnover and further contribution to the problems. Many education professionals are struggling right now, and they need support from their administrators – not judgment or fear driven oversight.

Stahlheber: Leaders can best prepare their teams by keeping them grounded in the district’s purpose – our “why.” We do this work to serve students and help them become thriving, contributing members of their communities. That shared purpose provides perspective during difficult moments and reminds us that the work is bigger than any one decision or controversy.

The reality is that some decisions, particularly those involving budgets, compliance or state and federal mandates,

Weathering Storms with Resilience

will not always be well received. Public criticism and conflict are often expressions of frustration with a situation rather than personal attacks on the individuals doing the work. Helping teams recognize that distinction allows them to respond thoughtfully instead of becoming defensive or reactive.

During periods of litigation, budget reductions, bargaining or student safety concerns, leaders should also acknowledge the emotional weight of the work. We don't have to pretend these situations are easy. By recognizing the challenges while reinforcing that we are working through them together, leaders help prevent isolation and burnout.

How can district leaders tell the difference between healthy urgency and initiative overload? Are there warning signs that a system is asking too much of its people?

Gallagher: Our research suggests that district leaders need reliable feedback loops that help them understand how improvement efforts are unfolding across the system.

District leaders need regular opportunities to hear from educators at multiple levels about whether priorities are clear, where demands compete and whether people have the time and support to implement changes deeply. Those conversations rarely happen on their own. Our research suggests that districts benefit from creating ongoing structures, such as cross-functional teams, that make these conversations a routine part of improvement rather than something that happens only when problems emerge.

Leaders don't need to choose between urgency and sustainability. They need systems that tell them when urgency is driving meaningful improvement and when it is outpacing the organization's capacity to implement change. Those feedback loops make it possible to adjust course before initiative overload undermines the work.

What is one practice districts can put in place before the next crisis that will make their teams more resilient when pressure comes?

Stahlheber: Resilience is built through many consistent practices that become part of the culture. If I had to identify one, though, I would say creating a regular practice of honest reflection and collaborative problem-solving.

When teams routinely talk about what is working, what isn't and what they could do differently, they become more comfortable addressing challenges before they become crises. They learn that raising a concern is valued, that mistakes can be opportunities to learn and that they don't have to solve difficult problems alone.

That culture takes time to build, but it pays dividends when pressure comes. Teams that have already developed trust, know how to communicate openly and are accustomed to working through problems together are much less likely to become reactive when faced with a crisis. They have the confidence and relationships to focus on solving the problem rather than becoming overwhelmed by it.

Gallagher: One practice I'd recommend is creating ongoing structures that allow information to move in multiple directions across the system. Our research suggests that districts benefit from regular opportunities to learn both how implementation is progressing and how improvement efforts are being experienced at different levels of the organization.

Those routines become especially valuable during periods of uncertainty because leaders already have trusted ways to understand what's happening, identify problems early, and adjust course; and educators have a reason to believe that senior leaders understand and are working to improve their experience. Building those feedback loops before the next crisis is far easier than trying to create them in the middle of one. ■■■

Nicole Krueger is a freelance writer based in Eugene, Oregon.



What does resilience look like for you and your organization? Let us know @casbogram.



Jennifer Stahlheber



Alix Gallagher



Kristin Souers



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Transforming Funds into Learning

How Purchasing and Finance Build the Foundation for Student Success

By Nicole Krueger

By the time a student has walked into a classroom, sat down at their desk and opened a textbook or logged in to a Chromebook, they have already been affected by countless financial and purchasing decisions made behind the scenes.

Someone has determined what types of furnishings and materials will be available in the classroom. Someone else has reviewed the service contracts that keep the school clean, comfortable and running smoothly. And district staff have analyzed funding requirements, negotiated pricing, ensured compliance and asked a deceptively simple question: How will this support students?

These decisions rarely draw attention. Rather, when finance and purchasing teams operate as intended, schools simply experience the result – receiving the right tools and services at the right time to equip students and teachers for learning.

“We do all the behind-the-scenes things so teachers and instructors can

focus on teaching and learning and not have to worry about the support systems, because those take place automatically,” says Hitesh Haria, associate superintendent of business services for Pittsburg Unified School District.

For school business professionals working in purchasing and finance, supporting students means protecting public resources so districts can maximize every dollar. It means balancing innovation with accountability and finding ways to say “yes,” while maintaining standards and processes that protect students, staff and communities.

This work may be invisible, but the impact is apparent in the classroom every day.

“What drives me is that even if we’re behind the scenes and not on campus or in the classroom, what we do every day helps our students and our community,” says Jennifer Bickley, business services manager for Shasta Union High School District.

Transforming Funds into Learning



“We do all the behind-the-scenes things so teachers and instructors can focus on teaching and learning.”

Designing the Student Experience

A district’s purchasing decisions don’t simply determine what schools buy. They shape how students learn.

“Purchasing has a really crucial role,” says Nick Brizeno, director of purchasing for San Marcos Unified School District. “We could really impair or really enhance the learning experience for students with the way we’re able to get things and services in the hands of teachers.”

He describes the purchasing department as a partner that helps districts move ideas from concept to implementation.

“We don’t want to be a department known for saying ‘no,’” he says. “We want to help you get to ‘yes,’ but do it in a way that benefits the district and budget.”

That requires much more than processing orders. Purchasing professionals evaluate contracts, review

vendors, consider safety requirements and ensure district decisions align with long-term goals.

For Bickley, getting to a “yes” means first asking why. Her team reviews purchases not only for compliance, but for purpose.

She recalls reviewing an order for a skateboard and initially wondering about the potential liability. Instead of immediately rejecting the purchase, her team asked for context.

The answer? The skateboard was part of a curriculum activity.

Once the purpose was clear, the purchase could move forward.

“That’s what we’re trying to verify,” Bickley says. “Give me a why you need something. If you can explain that, we can let it go through.”

That mindset requires collaboration across departments. A teacher may identify a promising classroom resource, but purchasing professionals ask additional questions: Can this scale across multiple sites? Does it protect student data? Does it align with district systems? Is there a more sustainable way to accomplish the same goal?

Brizeno points to classroom furnishings as an increasingly important example of how purchasing can directly impact the student experience.

Rather than viewing furniture as a simple purchase of desks and chairs, his district evaluated how classroom environments support teaching and learning. The district’s furniture selection process considered design, flexibility, professional development and how spaces could adapt to changing instructional approaches.

The goal was to move away from traditional rows of desks toward environments that support collaboration, student agency and different learning styles.

“We looked at it as, wouldn’t it be great if the furniture we provide matched

the way we're asking teachers to teach the subject matter?" he says.

Those choices reflect a broader shift in school business leadership as operational decisions are increasingly connected to educational outcomes.

Purchasing teams are also helping districts rethink accessibility and inclusion.

Flexible furniture can allow students to move, adjust their environment and remain engaged in classrooms rather than being separated from peers when they need additional support.

That's why Brizeno emphasizes the importance of getting outside the office and seeing how resources are actually used.

"I'm a huge proponent of proximity," he says. "It's easy to sit here and not know what's going on. It's much more impactful to get out into classrooms and see – this is what we do, we had a hand in this."

Balancing Innovation and Accountability

In today's rapidly changing technology landscape, districts are frequently approached with new software products and services promising to transform education. Purchasing teams work alongside technology departments to test, evaluate and determine whether those tools truly fit the district's needs.

"Everyone likes to sell you on something," he says. "Everyone thinks their thing is the next best thing. Having the ability to try and test out without financial burden is really valuable to us, to make sure it would work in our ecosystem."

That balance between supporting innovation and maintaining accountability is central to purchasing work. The goal is not simply to find the cheapest option – it is to find the right solution.

That's why effective operations depend on trust between district teams and school sites, Bickley says.

"We have to have strong relationships with people on the ground at all of our sites," she says. "There has to be an element of trust and understanding."

That trust allows purchasing professionals to have difficult conversations, while still working toward shared goals.

A request may need to be modified. A funding source may not allow a particular expense. A new technology tool may require additional review.

But those conversations are not about creating barriers. They are about protecting the district's ability to serve students.

With increased public attention on how districts spend money, accurate coding and documentation are more important than ever. Audits may require districts to demonstrate how funds were spent and whether purchases complied with restrictions.

"When auditors pull books, they go through it with a fine-tooth comb," Bickley says.

Strong purchasing and finance systems help districts avoid costly mistakes and ensure resources remain available for students.

Funding Student Success

The work of school finance professionals isn't just about reducing expenses. It's about creating opportunities – finding ways to stretch limited dollars further so districts can continue investing in students.

Haria describes this as a constant exercise in evaluating value. Before allocating funds, district leaders must consider whether a budget item is truly necessary, whether it will have a meaningful impact on students and whether



“When auditors pull books, they go through it with a fine-tooth comb.”

Transforming Funds into Learning

“ Every dollar preserved represents another dollar that can be invested elsewhere.

there is a more efficient way to accomplish the same goal.

“Before we open the wallet, let’s ask, ‘Can I do it any other way?’” Haria says.

Those conversations can be challenging, but they help districts preserve resources for the investments that matter most.

For district finance professionals, saving money is not an end in itself. Every dollar preserved represents another dollar that can be invested elsewhere.

To that end, finance and purchasing teams are increasingly looking for strategic opportunities to leverage the size and collective buying power of school districts.

By standardizing purchases, negotiating contracts and collaborating with other districts, school business leaders can often secure better pricing and redirect savings back into classrooms.

Haria points to technology purchases as one example. Rather than allowing

schools to purchase a wide variety of devices independently, districts can establish common standards and negotiate based on larger quantities. A consistent approach not only simplifies support and maintenance, but also strengthens the district’s position when working with vendors.

“When you’re spending a lot of money on computers every year, you should get better pricing,” Haria says. “If you’re scattered and buying different things, you’re not getting the value of your spend.”

Strategic purchasing can also include partnering with other agencies or districts to increase buying power. A single district may have limited leverage when purchasing a product or service, but multiple districts combining their needs can create a larger opportunity for savings.

The goal is not simply to find the lowest price. School business leaders



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emphasize the importance of finding the best value – balancing cost, quality, durability and long-term impact. Purchasing teams bear the heavy load of vetting vendors and products so teachers and principals don't have to.

"A cheap product that breaks every two seconds doesn't help," Haria says. "It's wasted money."

Turning Opportunities into Resources

Maximizing district resources also means looking beyond traditional funding sources.

Finance leaders regularly search for grants, partnerships and alternative funding opportunities that allow districts to expand programs without relying solely on general fund dollars.

In Bickley's district, finance professionals actively share information about

available grants with departments that may benefit, helping staff identify opportunities to support student programs and services.

"We have to put guidelines on how we spend district dollars," she says, "but we also look for community support, grants and different resources we can tap into."

Those opportunities can make a significant difference for students. Districts may use grants or partnerships to support career technical education programs, student support initiatives, classroom resources or specialized equipment.

Haria describes this approach as finding ways to use resources strategically – sometimes even allowing one funding opportunity to free up dollars for another need.

For example, if a district receives grant funding for a purchase it had

“Maximizing district resources also means looking beyond traditional funding sources.”

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“**Creative financial management does not happen by accident. It requires long-term planning, collaboration and a deep understanding of how operational decisions connect to student outcomes.**”

planned to make using general fund dollars, those original dollars can then be redirected toward another priority.

“Sometimes you can use the dollar twice,” Haria says.

That kind of creative thinking requires finance leaders to understand not only budgets, but also district priorities and student needs. They must know where resources can have the greatest impact and where additional opportunities may exist.

Creative financial management does not happen by accident. It requires long-term planning, collaboration and a deep understanding of how operational decisions connect to student outcomes.

Haria emphasizes that successful districts define what they are trying to accomplish first, then determine what resources are needed to make that vision

a reality. He views every purchasing decision through the lens of student impact.

“What does success look like for us?” he says. “How do we know when we achieve it?”

That question shapes everything from textbook adoption cycles to technology investments and facility improvements.

“Preplanning is very important,” he says. “Understanding what the needs of the school district are, planning accordingly and making sure students get what they need when they need it.” ■■■

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Nicole Krueger is a freelance writer based in Eugene, Oregon.



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Just as I sat down, my supervisor burst through the door yelling, "We have a **(adjective)** _____ situation!"

Apparently, someone had accidentally entered **(number)** _____ orders for **(plural noun)** _____ instead of the planned purchase of **(number)** _____.

To make matters worse, the Transportation Department reported that every school bus had been rerouted to **(place)** _____ after a GPS system mistakenly identified it as the district office.

As Chief Business Official, I immediately assembled a team consisting of a **(job title)** _____, a **(animal)** _____ and one very confused **(famous person)** _____.

Our first step was to review the district's emergency procedures, which were stored inside a **(noun)** _____ located behind the **(school subject)** _____ classroom.

After **(number)** _____ minutes of careful planning, we developed an innovative solution. We would exchange the unwanted **(plural noun)** _____ for **(plural noun)** _____ and use the savings to purchase a state-of-the-art **(noun)** _____.

The school board was impressed. One trustee called it "the most **(adjective)** _____ financial strategy in district history."

Soon, reporters from **(news organization)** _____ arrived to cover the story. They were especially interested in the role played by the **(animal)** _____, who had somehow become Director of **(department)** _____.

By the end of the day, the budget was balanced, the buses returned from **(place)** _____ and every student received a commemorative **(noun)** _____.

The superintendent congratulated the team and announced that next year's strategic plan would be entirely based on the principles of **(silly word)** _____.

And that is how we survived the Great School Business Emergency of **(year)** _____.

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* Source: LSEG, negotiated transactions ranked by number of issues and by par amount for 2025 as of July 8, 2026