

Leadership & How to Get a Promotion

Aaron Heinz, Colusa County Office of Education

Matt Phillips, CPA, School Services of California

The Current Landscape

Right now there is a shortage of qualified business professionals in our industry.

The latest figures from FCMAT indicate that 40% of current CBOs will retire or leave the industry by the 2024-25 school year.

School business is in desperate need of qualified CBOs. We are looking internally, at you, to find solid candidates to promote from within.

The time to act is right now!

Getting a promotion - why listen to us?

Matt Phillips, CPA

- Director of Management Consulting Services,
School Services of California
- Prior Director of Fiscal Services,
Rocklin Unified School District
- FCMAT CBO Mentor Program graduate 2014-15
- Reformed auditor and Chico State success story

Getting a promotion - why listen to us?

Matt Phillips, CPA

- Also works as a Human Graph



Getting a promotion - why listen to us?

Aaron Heinz

- 13 job titles in 15 years (!!!)
- Started at the ground floor as a delivery driver
- Trained by the best in the business
 - FCMAT CBO Mentor Program graduate 2014-15
 - FCMAT CBO Mentor 2021-22
 - School Services of California
 - Sitting CBOs
- Deputy Superintendent at Colusa COE

Getting a promotion - why listen to us?

Aaron Heinz

- Also dabbles as a weatherman



13 job titles in 15 years!

1. Summer 2006 – Food Services Delivery Driver (SJUSD)
2. Spring 2007 – Account Clerk I, ECE (SJUSD)
3. Winter 2008 – A/R Account Clerk II, Food Services (SJUSD)
4. Spring 2010 – Budget Services Account Clerk II, Budget Services (SJUSD)
5. Summer 2010 – Fiscal Technician I, Budget Services (SJUSD)
6. Fall 2010 – A/R Account Clerk II, Food Services (SJUSD)
7. Summer 2012 – Business Services Technician (GCC)
8. Spring 2013 – Accountant, Business Services (EDCOE)
9. Spring 2015 – Program Manager II, Business Services (SJCOE)
10. Summer 2015 – Accounting Coordinator IV, Business Services (SJCOE)
11. Winter 2018 – Director, Internal Business (SCSOS)
12. Fall 2019 – Associate Superintendent, Administrative Services (CCOE)
13. Summer 2021 – Deputy Superintendent, Administrative Services (CCOE)

How I got there, and what it takes

1. Resume Building
2. Interview Skills
3. “Other Duties as Assigned”
4. Leadership

1. Resume Building

March 2009

AARON HEINZ

OBJECTIVE

The position of Account Clerk II.

EDUCATION

Associate in Applied Science, Business Administration with an Emphasis in Accounting
Heald College, Roseville, CA
October 2007, GPA 4.0

University of California, Berkeley
General Education, 1990-1992

RELATED COURSES AND SKILLS

- Principles of Accounting I – III
- Bookkeeping (QuickBooks Pro)
- Payroll Accounting Concepts
- Federal and State Tax Preparation
- Public Speaking
- Ten-key at 186 strokes per minute
- Keyboarding at 59 words per minute
- Presentation Software (PowerPoint)
- Advanced Word Processing (Word, WordPerfect)
- Spreadsheet (Excel) and Database (Access) Software

CERTIFICATIONS

California Tax Education Council (CTEC # A154783)

EXPERIENCE

San Juan Unified School District. Carmichael, CA **2007-Present**
Account Clerk I, ECE. Responsible for maintaining eligibility files for over 100 families enrolled in SJUSD Early Childhood Education child care. This includes: annual certifications; status changes; monthly billing; collections; state-mandated attendance reports; file terminations; situational problem solving; customer service.

Quaffer LLC. Antelope, CA **2000-2007**
Owner, Operations Manager. Responsible for: invoicing customers; posting revenues and expenses; preparing income statements and balance sheets; accounts receivable collections; cash deposits; inventory control; tax preparation; order fulfillment; shipping and receiving; marketing; print ad creation; trade show presentations; customer service; inbound/outbound phone calls; sales.

Enterprise Rent-a-Car. Roseville, CA **2001-2002**
Management Trainee. Car rentals; handled cash; accounts receivable collections; daily branch cash settle-ups; monthly branch reconciliations; customer service; inventory control.

The Money Store, Auto Finance Division. Sacramento, CA **1997-1998**
Loan Service Counselor. Serviced delinquent auto loans; accounts receivable collections; customer service; skip tracing.

OTHER ACTIVITIES

National Dean's List, Heald College
Phi Theta Kappa Honor Society, member, Heald College
UC Regents Scholar, UC Berkeley
Phi Kappa Tau fraternity, UC Berkeley

1. Resume Building July 2019 (page 1)

	AARON HEINZ
██████████ Roseville CA, 95678	Residence: ██████████ Email: ██████████
CAREER OBJECTIVE	
The position of Associate Superintendent of Business Services with the Colusa County Office of Education, with growth and leadership opportunities.	
PROFESSIONAL SUMMARY	
Accomplished Financial Professional with a diverse background that includes, among others:	
<ul style="list-style-type: none">• School financial accounting and budget development• Process improvement• Project management while maintaining fiscal compliance• Team building	
<i>Results-oriented leader with communication, decision-making, analytical, and problem solving skills.</i>	
PROFESSIONAL EXPERIENCE	
<u>SUTTER COUNTY SUPERINTENDENT OF SCHOOLS. YUBA CITY, CA</u> <i>Director of Internal Business</i>	2018 – PRESENT
Oversight of all internal county office accounting functions, including accounts payable, accounts receivable, general ledger, estimated actuals, year-end close, annual audits, payroll, and all budget reporting periods. Responsible for all budgets, encompassing in excess of \$46 million, including review of grant and contract expenditure reports, fixed and capital asset record keeping, and coordination of State, Federal, and local program compliance. Direct supervision of 15 Internal Business and Payroll staff including training, support, and evaluations.	
<u>SAN JOAQUIN COUNTY OFFICE OF EDUCATION. STOCKTON, CA</u> <i>Coordinator IV - Accounting, Business Services</i>	2015 – 2018

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1. Resume Building July 2019 (page 2)

Oversight of accounts payables, accounts receivables, general ledger, estimated actuals, year-end close, and annual audits. Direct supervision of seven Business staff, and co-supervision of 16 Business staff including training, support, and evaluations. Responsible for over 600 budgets encompassing in excess of \$300 million, including review of grant and contract expenditure reports, fixed and capital asset record keeping, general journals and budget transfers, and coordination of State, Federal, and local program compliance

EL DORADO COUNTY OFFICE OF EDUCATION. PLACERVILLE, CA

2013 – 2015

Accountant, Business Services

Administration of the SELPA special education Allocation Plan for 15 school districts. Maintain complete sets of financial, accounting, and budgetary records. Analyze and reconcile financial data and cash fund balances. Develop various fiscal information and reports. Analyze purchase orders. Process cash payments to charter schools and school districts accurately and timely. Provide charter and district support in various areas of special education.

GATEWAY COMMUNITY CHARTERS. MCCLELLAN, CA

2012 – 2013

Business Services Technician

Purchasing and accounts payable for five charter schools covering nineteen sites. Process all student meal applications for free and reduced program. Maintain all copier leases. Monthly bank reconciliations and weekly bank deposits. Create new vendor files and provide customer service.

SAN JUAN UNIFIED SCHOOL DISTRICT. CARMICHAEL, CA

2006 – 2012

Increasingly responsible experience over time with a wide range of responsibilities.

Food Services Account Clerk II / Fiscal Technician I

Responsible for all accounts receivable. Handling of deposits averaging one million dollars per month. Enrollment reports for non-public sites and ECE. Monthly bank reconciliation. Audit non-public sites vs. Free and Reduced applications. Monthly journal entries and reports for General Ledger entry. Provide customer service to families regarding student accounts. Year-end closing and Federal Claim Report.

Budget Services Account Clerk II

Budget control over twenty departments and schools including multi-year projections. Processing of service agreements, purchase requisitions, and budget transfers. Analysis of budget reports. Conduct training sessions on budget principals. Process of direct payments. Year-end close.

Early Childhood Education (ECE) Account Clerk I

ECE liaison to enrolled families to help maintain program eligibility. Processed monthly state and federal reports. Conducted program enrollment meetings for prospective families.

Food Services Warehouse Delivery Driver

Daily food delivery to more than 20 school sites. Inventory control. General warehousing.

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1. Resume Building July 2019 (page 3)

QUAFFER, LLC. ROCKLIN, CA

2000—2007

Founder/Owner, Operations Manager

Managed national sales staff of five to ten, including training and professional development. Prepared and analyzed quarterly income statements and balance sheets. Maintained accounts receivable, cash deposits, and inventory control. Tax preparation. Order fulfillment, shipping and receiving. Marketing, including print ad creation and trade show presentations. Customer service.

EDUCATION

COLORADO STATE UNIVERSITY – GLOBAL CAMPUS

2015—2017

Bachelor of Science, Accounting (magna cum laude)

- Sigma Beta Delta Honor Society

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM (FCMAT)

2014—2015

Chief Business Officials (CBO) Mentor Training Program

- Graduated March 2015 – with CASBO CBO certification awarded in April 2015

HEALD COLLEGE

2006—2007

Associate in Applied Science, Business Administration with Emphasis in Accounting

UNIVERSITY OF CALIFORNIA, BERKELEY

1990—1992

General Education

- UC Regents Scholar

BOARD / COMMITTEE MEMBERSHIPS

CASBO – SACRAMENTO SECTION

2019—PRESENT

Chair, Finance Professional Council

VENTURE ACADEMY FAMILY OF SCHOOLS

2015—2018

Board Treasurer (Voting Member)

ONE CHARTER ACADEMIES

2015—2018

Board Treasurer (Voting Member)

SAN JOAQUIN BUILDING FUTURES ACADEMY

2015—2018

Board Treasurer (Voting Member)

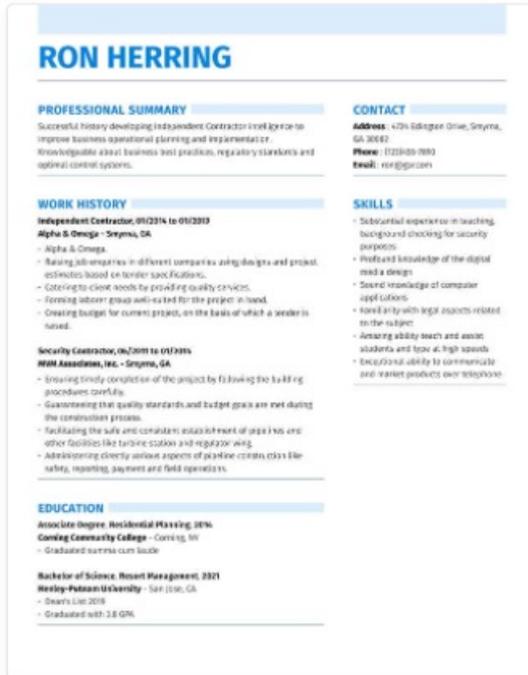
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1. Resume Building - Key Differences

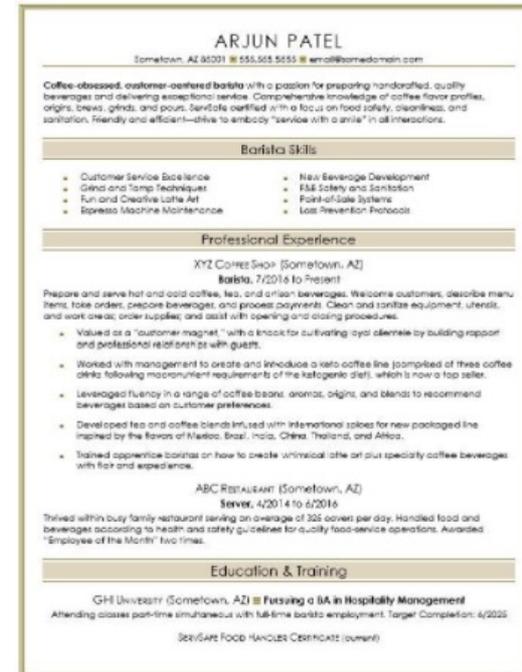
- Resumes DO NOT have to be a single page (max three)
- Limited use of bullet points and semicolons
- More conversational style, sentences over lists
- Emphasis on experience versus education
- Include a Professional Summary
- Larger font - make it easier on the reader

1. Resume Building - Key Differences

- Color isn't necessarily a bad thin



- Be different, but not obnoxious



2. Interview Skills - How to Tell Your Story

At its core, the interview is a sales pitch—your sales pitch. No one else in the room knows your story better than you do, so it's incumbent upon you to tell it thoroughly and effectively. If you don't do it, no one else will.

As an interviewer, I might know a little bit about you from your paperwork, but don't count on it. Your job is to make your story jump off the page, and make a positive impression on me and the interview panel. Don't ever rely on anything or anyone else to do that work for you.

2. Interview Skills - How to Tell Your Story

I teach the interview in three simple parts:

1. The Introduction (Beginning)
2. The Questions (Middle)
3. The Close (End)

You have direct control over two out of three of these parts, so use this to your advantage!

2. Interview Skills - How to Tell Your Story

1. The Introduction

The introduction is the foundation of your story, so build it soundly. First, introduce yourself and thank the interview panel for the opportunity to interview before them.

Next, the very first question of any interview SHOULD be something similar to: “Please tell us a little bit about yourself, your work history, and your education that makes you the most qualified candidate for this position.”

But what happens if the first question is anything other than that...

2. Interview Skills - How to Tell Your Story

1. The Introduction

Hijack the first question! No, seriously, hijack it.

The late, great Ron Bennett taught us in CBO Mentor training that if the first question is anything other than “tell us about yourself,” politely say that “I’d love to answer your question in just a moment, but first I’d like to tell you a little bit about myself and why I’m the most qualified for this position.” And then do exactly that.

2. Interview Skills - How to Tell Your Story

1. The Introduction

In theory, this should be the question you spend the most time answering. You are building the story of you, the foundation, so tell them everything that's relevant, including:

- Education
- Job history and experience
- Specialized skills
- Anything else that applies

And because you already know this question is coming, you should be an expert at it, right? But how?

2. Interview Skills - How to Tell Your Story

1. The Introduction

PRACTICE! PRACTICE! PRACTICE!

Find a room with a mirror, and go in there and practice your opening answer until you know it front and back. Practice making eye contact with yourself. Practice mixing in a smile once in a while. Practice until you're comfortable, and then practice a little bit more.

If you're not prepared to put in the work before you show up for an interview, you might not really be ready for a promotion. Go back and reread that last sentence again.

2. Interview Skills - How to Tell Your Story

2. The Questions

- Interview for the job you want, not the job you have
- Study the job description
- Do research on the organization you're interviewing with
- When possible, include this information as part of your answer (ie. new building projects, specialized grants, etc)
- Display confidence when answering, but show humility

2. Interview Skills - How to Tell Your Story

2. The Questions

- Answer every question to the best of your ability
- Be mindful of the time, but get your talking points in
- DO NOT embellish, exaggerate, or lie
- If you don't know the answer, say so, but try to think of a related experience that you can speak to
- If you don't know the answer, also mention that this is an area of professional growth you need, and that you're a fast learner, and willing to do research on your own

2. Interview Skills - How to Tell Your Story

2. The Questions

Answer questions using the STAR method

- Situation (describe a similar situation you've experienced)
- Task (describe what your responsibility was in the situation)
- Action (explain exactly what steps you took to address it)
- Result (share what outcomes your actions achieved)

2. Interview Skills - How to Tell Your Story

3. The Close

At the end of the interview, a common last question will be “is there anything else you’d like to add?”

Don’t waste this opportunity to close the sale.

Briefly recap what you discussed in your introduction, and highlight one more additional point that leaves them wanting more.

2. Interview Skills - How to Tell Your Story

3. The Close

Example - recap your experience and skills related to the position, and close with “additionally, I’m one of the hardest workers on any team I’ve ever been on. I’m normally the first one in and the last to leave—and I always get the job done, no matter what. So if you place a high value on a strong work ethic, then this might be a good fit for both of us. And again, thank you for the opportunity to speak with you today.”

2. Interview Skills - How to Tell Your Story

3. The Close

Other topics that can be used for the close:

- “...if you value someone who’s driven and shows up to work with a great attitude every single day,...”
- “...if you value someone who’s been in the trenches and has the firsthand experience it sounds like you need,...”

****ALWAYS LEAVE THEM WANTING MORE****

2. Interview Skills - How to Tell Your Story

3. The Close

After the close, the panel may ask you if you have any questions for them. Pro tip, don't try to make the panel look dumb. And don't rattle off five questions, that's annoying. Limit it to one or two:

- What trait(s) do you look for in a qualified candidate?
- What's your timeline look like for notifying candidates?
- In your opinion, what's the best thing about working here?

And that's it, call it a day, you're done. Good job! Say thank you again and leave.

2. Interview Skills - How to Tell Your Story

3. The Close

Be proactive while you wait to hear back

- Most interview panels will use an objective grading rubric, but a thank you email, or professional card never hurts
- Even if you don't get the job, you never know when you might cross paths again - or be referred by word of mouth to a neighboring LEA

3. “Other Duties as Assigned”

These are the intangibles that I’ve experienced on my journey with regards to getting a promotion.

They’re random questions and bits of information that I still find valuable.

Not all of these will apply to your situation, so take what you can use and leave the rest.

3. “Other Duties as Assigned”

“Should I finish my education?”

Short answer, yes.

Longer answer, yes. We work in education and we should be examples of the industry we’re in. Most higher level business positions require a degree these days, so build it into your long term plan.

And it’s never too late to go back to school. I went back to school twice, in 2006-07 to get an AAS degree to get my foot in the door, and again in 2015-17 to get my BS in Accounting after I’d outkicked my coverage promotion-wise.

3. “Other Duties as Assigned”

“Do I need to get a CBO certification?”

If you want to be a CBO, yes. The school of thought on this certification has changed over the past few years. Originally this certification has been viewed as a nice addition to a candidate’s qualifications. Recently, there is a concerted effort underway to make a CBO certification a requirement for the CBO position. It may be a few years out, but that’s where things are heading.

3. “Other Duties as Assigned”

“Are you willing to commute?”

When you expand your driving radius from home, you open up countless more promotion opportunities. At the end of the day, what sacrifices are you willing to make to advance your career? What are your pros and cons?

My Roundtrip Driving Distances

Roseville to Placerville (EDCOE) - 70 miles

Roseville to Stockton (SJCOE) - 140 miles

Roseville to Yuba City (SCSOS) - 70 miles

Roseville to Colusa (CCOE) - 120 miles

(2013-2021 = just shy of 300,000 miles)

3. “Other Duties as Assigned”

“Should I notify my boss that I’m applying elsewhere?”

I know many people in the field who like to keep their promotion plans to themselves, and for them it might work well. Just remember that school business is a very small group, and word gets around eventually. Hiding something like this could come back to haunt you.

I’m of the belief that not only am I going to share my plans with my boss, I’m also going to ask for a current letter of recommendation from them. Now there’s no secrets, no hurt feelings later, and they’ve got skin in the game with their letter out there supporting me.

3. “Other Duties as Assigned”

“How long should I stay before I start looking to promote?”

My rule of thumb has always been to stay at least two years, unless it's within the same organization. This provides a couple years of stability for the organization that's hiring me, and gives me two years to become an expert in the new position.

As an employer, one of my mentors taught me that it's always better to have a highly qualified employee for a couple of years than to settle for an average employee for the long term. I'm looking for the best of the best, knowing full well they'll be moving up soon, and that's ok.

3. “Other Duties as Assigned”

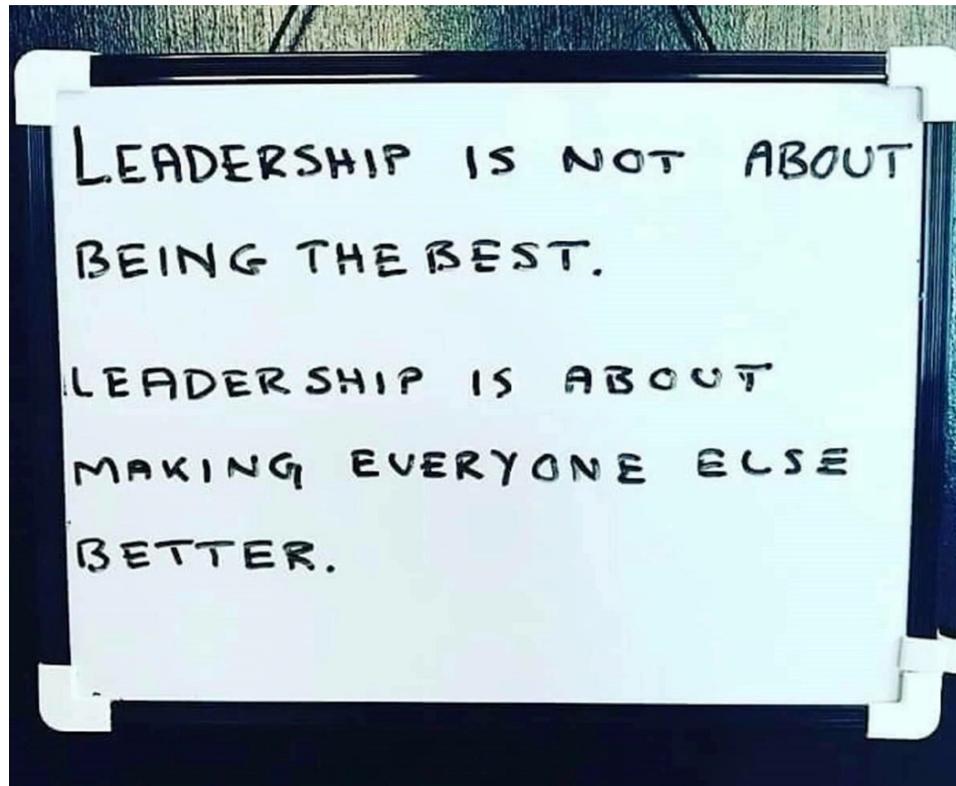
“How do I prepare now for my next job?”

Assuming your desire is to move upward, not laterally, leadership skills are in high demand.

Look for ways in your current role to expand your knowledge.

Become a volunteer, not a voluntold.

4. Leadership



4. Leadership

“School business administration is not an end in itself. It exists for the sole purpose of facilitating the educational program of a school and school district. It should operate to support the teacher in the classroom, the principal in the school, the school board and central administration as each strives to fulfill its responsibility toward the accomplishment of the required educational mission.”

-Anonymous

4. Leadership

Why is leadership so important, and what does that mean and look like?

- Being a leader before you're a manager
- Being an effective leader as a manager
- Pulling up everyone around you, building new leaders, rinse, repeat

4. Leadership

Traits of a good leader (what does it look like?)

- Treat people with respect
- Communicate with your team, learn about them
- Be a GREAT listener, be understanding
 - Sometimes people don't need an answer, they just need to be heard, don't try to fix everyone
- Let someone fail and pick themselves back up
- Be someone's inspiration, be the reason they like what they do
- Always be teaching, always be learning
- Be willing to do what others are not
 - Walk the talk

4. Leadership

Traits of a good leader (what does it look like?)

- PROTECT YOUR ATTITUDE
 - You are the only person who is in direct control of your attitude, despite any outside influences
 - Be mindful of how you act, stay calm even when angry, show grace under pressure always
 - Before you're a manager: if you can't stay in control of yourself, managers see that as a sign that you are not ready to lead others
 - As a manager: if you can't stay in control of yourself, everyone else sees this and loses confidence in your leadership abilities
 - Stay in control of yourself

4. Leadership

“Before you are a leader,
success is all about growing
yourself. When you become
a leader, success is all about
growing others.”

- Jack Welch

[facebook.com/BradleySugars](https://www.facebook.com/BradleySugars)

4. Leadership

Being a leader before you're a manager

- Become an expert at your craft, not a liability
 - It's ok to make mistakes, but only make the same mistake once
- Cross train - learn how to support others
 - Make yourself more valuable, become a go-to on your team
- Be a motivator, not an anchor
 - Being in the trenches is hard enough as is, a bad apple makes it 100 times worse
 - Be the light that others look to
- Win the day

4. Leadership

Win your day!

- People have a common misconception that one big thing, good or bad, is going to happen to make or break their day
- In reality, that happens maybe only a few times a year
- Concentrate on the small challenges that you can win every day
- “It’s a small victory, but it’s a victory nonetheless.”
- If you build up enough small victories, you win
 - ...the day
 - ...the week
 - ...the month
 - ...the year

4. Leadership

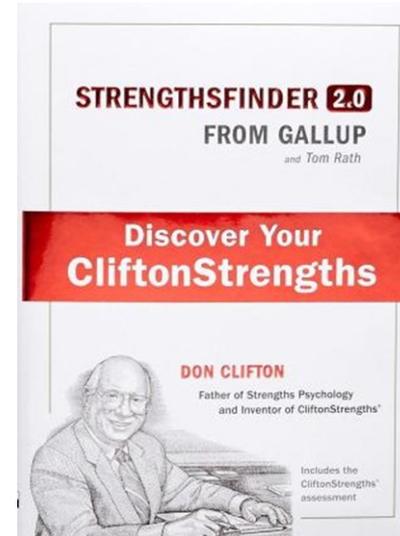
Be an effective leader as a manager, and be a mentor

- Lead by example
- Set realistic goals
- Share your experiences
- Allow members of your team to shine
 - Never miss an opportunity to give someone credit
 - Appreciate their efforts
- Give them opportunities to succeed
- Let them fail, but keep challenging them
- Be human
 - It's ok to laugh
 - It's ok to cry
 - It's ok to be a friend

4. Leadership

Strengths Based Leadership

- 34 strength themes
- Take a 30 minute test, 177 questions
- Measures your talents
- Identifies your top five strengths
- Maximize your potential



4. Leadership

StrengthsFinder Qualities

EXECUTING 执行力	INFLUENCING 影响力	RELATIONSHIP BUILDING 关系建立	STRATEGIC THINKING 战略思维
People with dominant Executing themes know how to make things happen.	People with dominant Influencing themes know how to take charge, speak up, and make sure the team is heard.	People with dominant Relationship Building themes have the ability to build strong relationships that can hold a team together and make the team greater than the sum of its parts.	People with dominant Strategic Thinking themes help teams consider what could be. They absorb and analyze information that can inform better decisions.
Achiever Arranger Belief Consistency Deliberative Discipline Focus Responsibility Restorative	Activator Command Communication Competition Maximizer Self-Assurance Significance Woo	Adaptability Connectedness Developer Empathy Harmony Includer Individualization Positivity Relator	Analytical Context Futuristic Ideation Input Intellection Learner Strategic

4. Leadership

- To be an effective leader, you must know what you're good at
- And more importantly, what you're NOT good at
- Understanding your own weaknesses will empower you to grow
- You should also prioritize your network
 - The higher up you go, the more responsibility you will have
 - No CBO knows everything, but a great CBO knows where to get the answer

4. Leadership

Do not confuse hierarchy with leadership as the two are not mutually exclusive.

ALL roles in schools have an element of leadership if the person holding the position wants to accept it.

- Bus Drivers
- Site Staff
- District Office Staff
- Counselors

4. Leadership

The sequencing of the A+ CBO characteristics will change - but the characteristics revolve around:

- An ability to integrate technical and policy skills
- Exceptional interpersonal and leadership skills
- An ability to express oneself in written and oral forms
- Strong analytical, creative, and innovative skills
- An ability to prioritize - to say “yes” and “no”
- A commitment to focused objectives, strong results, and accountability

Thank you!!!



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Matt Phillips mattp@sscal.com