

INSTITUTE FOR  
CATHOLIC LIBERAL  
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# Aspiring School Leaders Program

## *Budget & Hiring*

DANNY FLYNN

# Come Holy Spirit!



All: Come Holy Spirit! Fill the hearts of thy faithful and enkindle in them the fire of Thy love.

Leader: Send forth Thy spirit, and they shall be created,

All: And Thou shalt renew the face of the earth.

Leader: Let us pray...

All: O God, Who by the light of the Holy Spirit, instructed the hearts of Thy faithful, grant us, in the same Spirit, to savor what is right and to ever rejoice in His consolation. Through the same Christ our Lord. Amen.



# Identifying Stakeholders

Board/Pastor

Business Manager

Admissions person? Multiple Administrators?

Finance Committee

Parent organization representative

Typically no teachers



# Scheduling the Framework

- Necessary stakeholders should have online access to view numbers as needed. All should be notified when month financials are updated.
- Quarterly meetings with Board/Pastor are a must.
- Have an understood threshold of when expenditures, new hires or key decisions need to be made.
- Publicize your end of year numbers at the same time each year (one pager with total figures to give an overall general idea).
- Schedule a parent info night to discuss changes to tuition structure. Test all of your models and practice this numerous times.

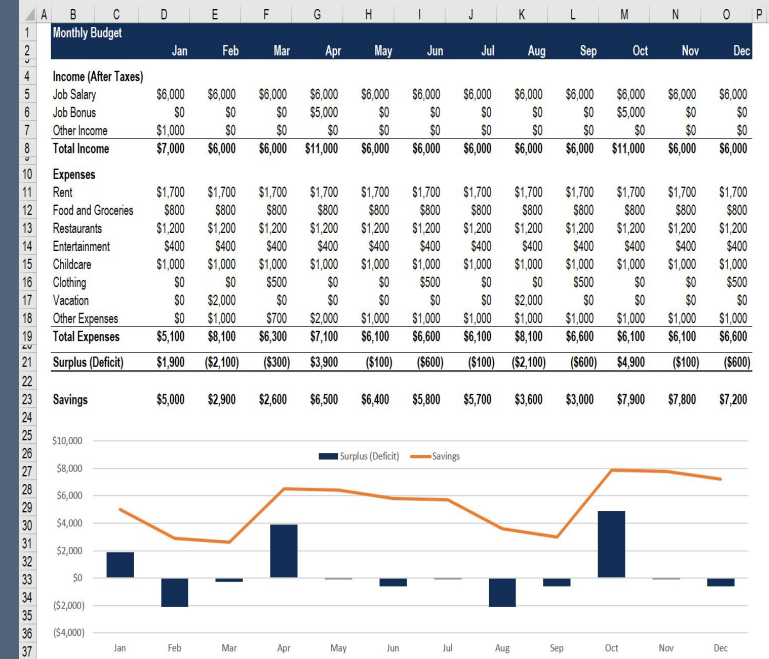


# Relationship with your Bookkeeper/Accountant

- This can make or break your experience as an administrator.
- This can set the school back financially for years if the relationship is unhealthy.
- Build a working relationship founded on mutual support and trust.
  - Dig into the details.
  - Ask questions when something seems off or you do not understand.
  - Do not assume things.
  - Thank them profusely for what they have done.
  - Forecast their timeline and how they will want to see things.
  - Give them the benefit of the doubt.



# Capturing the Trajectory of the Budget





## See Historical Trends

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# Best Practices for a Healthy Budget

- Tuition should cover 80% or more of your expenses.
  - What penalties or policies are in play when a family does not pay? Cannot pay is a different issue.
- Diversify and spread out the fundraising options throughout the calendar.
- You should not make the current parent population your target market for everything.
- Transparency and healthy dialogue with Pastor/board/bookkeeper.
- Keep your expenditures conservative for the first 2-3 quarters.
- If you do not have the money for something, plan it out and spread out the purchase over multiple years.
- Periodically go back and review the statement of activities and dig into the general ledger to double check things.
- Set reminders to review the topic regularly.



# Budget Practices

- Understand terminology. Accounts or accountants may refer to things as X and in the school it is called Y.
- Need board members and/or parents who are smarter than you regarding financials to look at the budget regularly.
- Get out of the building to work on the budget. Helps to stay focused on the bigger picture and small details all at once.
- Keep proper checks and balances in play so that everyone is holding each other accountable.
- There is a difference between fiscal year calendar year, prepaid and pledged.



# Taking Risks vs Playing it Safe

- Is it better to ask forgiveness than permission?
- What are you willing to gamble on?
- What things will you say no to? (Blinds, carpets, and curtains?)
- What things will you make special appeals for?
- How will you manage financial comments and suggestions from parents?
- How much are you willing to invest in training new staff and potentially losing them shortly thereafter?
- If you pay for training for new staff do you have a contract in place to get time back on your investment in them?



# Hiring Process Timeline

- Ask staff if they plan to return the following year in January or earlier. This allows you the best window of time to find and hire the best candidates.
- Start asking trusted sources if they can recommend candidates.
- Posts jobs in like minded organizations, ICLE, Catholicjobs.com and so on.
- Interview candidates multiple times with various people.
- Ensure that you explain the mission thoroughly and they grasp it.
- Walk the campus and the building with them.
- Have them teach a sample lesson?
- Check references!
- The topic of benefits and compensation range has to be addressed early!.



# Identifying Red Flags

- Always ask why they want to work with children from the proposed age group.
- Ask about what they do in their free time.
- What level of professionalism do they exude?
- Ask them to give an example of a scenario where there was high drama and conflict resolution was needed.
- Ask how comfortable they are upholding the full teachings of the Catholic faith.
- They must know this is hard work and not a trial run.
- Ask if they are coachable. Do they see this as a vocation or a job?



# The Right Fit

- When you find someone who is the right fit, hire them. Figure out a way to give them enough duties to channel their gifts and talents even if it is for short term.
- You will know after a thorough amount of prayer and discernment, having multiple interviews and conversations with several stakeholders.
- Having the proper set of questions and experiences will allow for this.
- Get to know the person as opposed to only knowing their skill set.
- Determine a number one overall qualifier that you want for all of your staff.



# Timing is Everything

- While it is important to discern properly you can get burned if you take your sweet time. You have to stay engaged. They sense if there is lag time.
- Stay transparent from the start. Give them a sense of the standard length of time the process will take.
- Talk to references and discern their opinions.
- Provide all the information they will need to make a decision all at once.
- When you make the offer, give them a timed window to get back to you.





# Increasing Staff Retention

- Ask them about vocational calling during the interview process.
- Give them insight into some big picture aspects of the direction of the school.
- Having regular informal observations and chances for evaluation will help improve staff or see that is no longer their calling.
- Celebrate, honor and praise their victories. Anytime a parents compliments a teacher, tell them right away.
- Give them new assignments, ask them to mentor other teachers.



# The New Normal in 2023?

- It is becoming more common that you have to go on the offensive and not sit and wait for the right person to show up.
- You need to ask what the salary needs are earlier in the conversation
- You need to question why they want to move to the area.
- Ask them how long they plan to stay.
- Recruit all year round. Assume you will offer the job to more than one person.



# Final Assignment: Choose one of the options below

1. Take an aspect of your budget and dissect it to the point where you can provide an accurate and detailed description of the activity in that sub category over the last 5 years and explain it to a board of advisors. Write out your description in one page or less.
2. Craft a written protocol to include the step by step process you would take from meeting a candidate to offer them a position to bringing them onboard. This should include multiple people and various layers.



# Discussion Questions

1. What do you foresee being the number one factor driving budget decisions in your school? Is it personal preference (spender vs saver), reality of enrollment, fundraising needs or other factors?
2. If you are starting a school from scratch or transitioning a school and revamping everything (including the budget) what key elements would you put in place to start off on the right track?
3. What are your top three priorities you are looking for in a candidate to be the right fit for your school? Which matters the most to you? If there is an 'it' factor what would it be?
4. What are some common red flags you should be aware of throughout your hiring process? Is it possible to know if you are going too fast or too slow through the process?



# Scenarios

1. Your school has a tradition of holding BINGO every Wednesday night in the cafeteria. This event has always made money for the school over the years. However, you hire a new accountant who looks at the program and sees that it has been making less and less money over the last 5 years while attendance has stayed the same. He believes the organizers are pocketing some of the money. What are your next moves?
2. Your enrollment dropped by 10% this year due to a variety of factors. You are projecting to make up 5% for next fall. What are your options to consider for cutting costs and what is the prudent thing to do based on lagging uncertainty?
3. Mr Wilson is the new principal at St James School. He is welcomed by staff and families. He sits down with his bookkeeper and she explains that 4 families still have a balance from last school year. School will begin in 4 weeks. Mr. Wilson reaches out to each of the families to determine how each of them can pay their outstanding balance from last year. Two of the families begin payment plans to pay off their debt before school starts. The other two families don't answer his calls. On the first day of school all 4 families arrive to drop off their children. What do you do?
4. Your best teacher just got engaged to a guy in the military. He is deploying soon and she is aiming to be wed and leave the county within 6 months along with him. You have 6 months to pull out all the stops to replace this teacher. What are your first 3 moves?
5. The school receptionist is retiring after serving the school for 40 years. She was loyal, but time seemed to catch up with her and there was more that she could not do than she could. You have to write a new job description. Which qualities, traits and skills will you include?

