

# **Building the finance team's capacity**

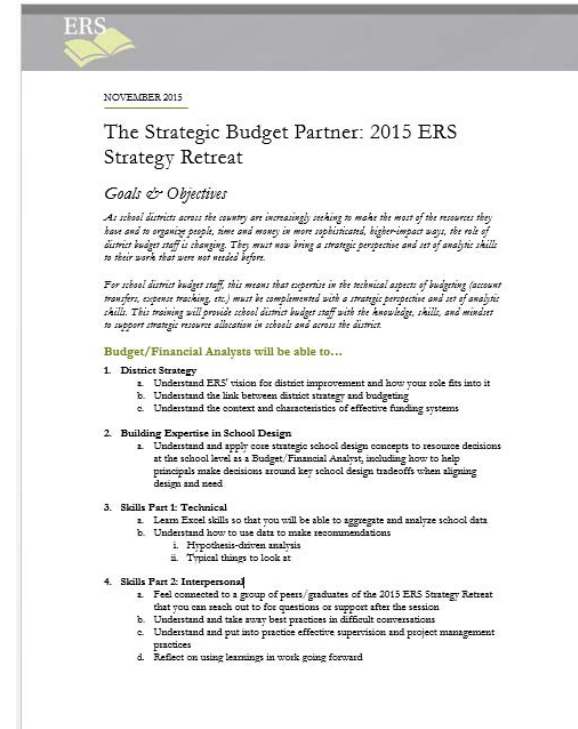
# Poll

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1. How many people do you have on your team?
2. What **two words** would you use to describe your biggest gap/challenge you face regarding your team's current roles, skills, and abilities?
3. The training my finance team receives sets them up to be **successful strategic thought partners** to principals and other central departments.  
[Yes, No, Somewhat]

# Recap: Budget/Financial Analyst Training

- Last week, Nov. 9 -12
- Packed agenda – Knowledge and Skill building sessions (& some fun!)
- 24 participants from LAUSD, CMSD, DPS, and SDP



**EBS CFO & Team Principal Support Framework**  
 Here are the District's budget team best support programs to be strategic and transformational

Layer	Data/ Reports	Process	Policies/ Accountabilities	Tools	Expertise/ Support
Operational	<b>Customization and report provides to program</b>  <b>The Right Information at the Right Time</b> Data and reports have currency, which supports subsequent use in budget preparation, modification. Data are provided in a format suitable for a budget manager.	<b>Clear and Understood</b>  The budgeting process is clearly communicated and understood, and not the program to which it applies. There is a focus on how to best use the program to build on the program being used.	<b>Limited to Requirements</b>  Policies are clearly communicated and understood by program managers. There is a focus on meeting "needs of" requirements, not on program. Data is kept to a minimum.	<b>User-Friendly</b>  Policies are provided in a user-friendly format to support the budgeting process. Tools only support the program and not the full process, compliance or reporting requirements.	<b>How the budget team supports program and builds their expertise</b>
Strategic	<b>Benchmark Against Best Practices</b> Report and data are only entered into the system when they are the highest level of information available. The program is used to compare performance and shared design and program.	<b>Design &amp; Needs Driven</b> School budget development is driven by school-level planning process. Program is used to support the design and needs of the school. Results in school-level reporting, not district-level reporting.	<b>Aligned with School Accountability System</b> Policies are aligned with school-level planning process. Program is used to support the design and needs of the school. Results in school-level reporting, not district-level reporting.	<b>Push Thinking</b> Policies are provided in a user-friendly format to support the budgeting process. Tools only support the program and not the full process, compliance or reporting requirements.	<b>School Design Focused</b> Policies are provided in a user-friendly format to support the budgeting process. Tools only support the program and not the full process, compliance or reporting requirements.

Dr. Diego Rojas-Soto 2017-2018 | Diego Soto

# Framework: The finance team's role

	Data/ Reports	Process	Policies/ Accountabilities	Tools	Expertise/ Illustrations
Functional	The right information at the right time	Clear and understood	Limited to requirements	User-friendly	Budget, accounting, & compliance-focused
Strategic	Benchmark against best practices	Design & needs driven	Aligned with school accountability system	Push thinking	School design focused

- What does this mean about the knowledge and skills analysts must have?
  - Foundational: District-specific system knowledge
  - Skills: Excel, communication, presentation, feedback
  - Strategic knowledge: School design, strategic tradeoffs, hypothesis-driven analysis
  - What else?

## What we heard: “What are the 3-5 things you are going to do differently when you return to your district as a result of this training?”

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“Reach out monthly to a subset of principals and try to be a more strategic budget partner, offering support and learning more about what goes on in their buildings.”  
-Latanya Vicks, SDP

“I am planning to... lead our team to become more strategic & less functional.”  
-Jen Bieter, SDP

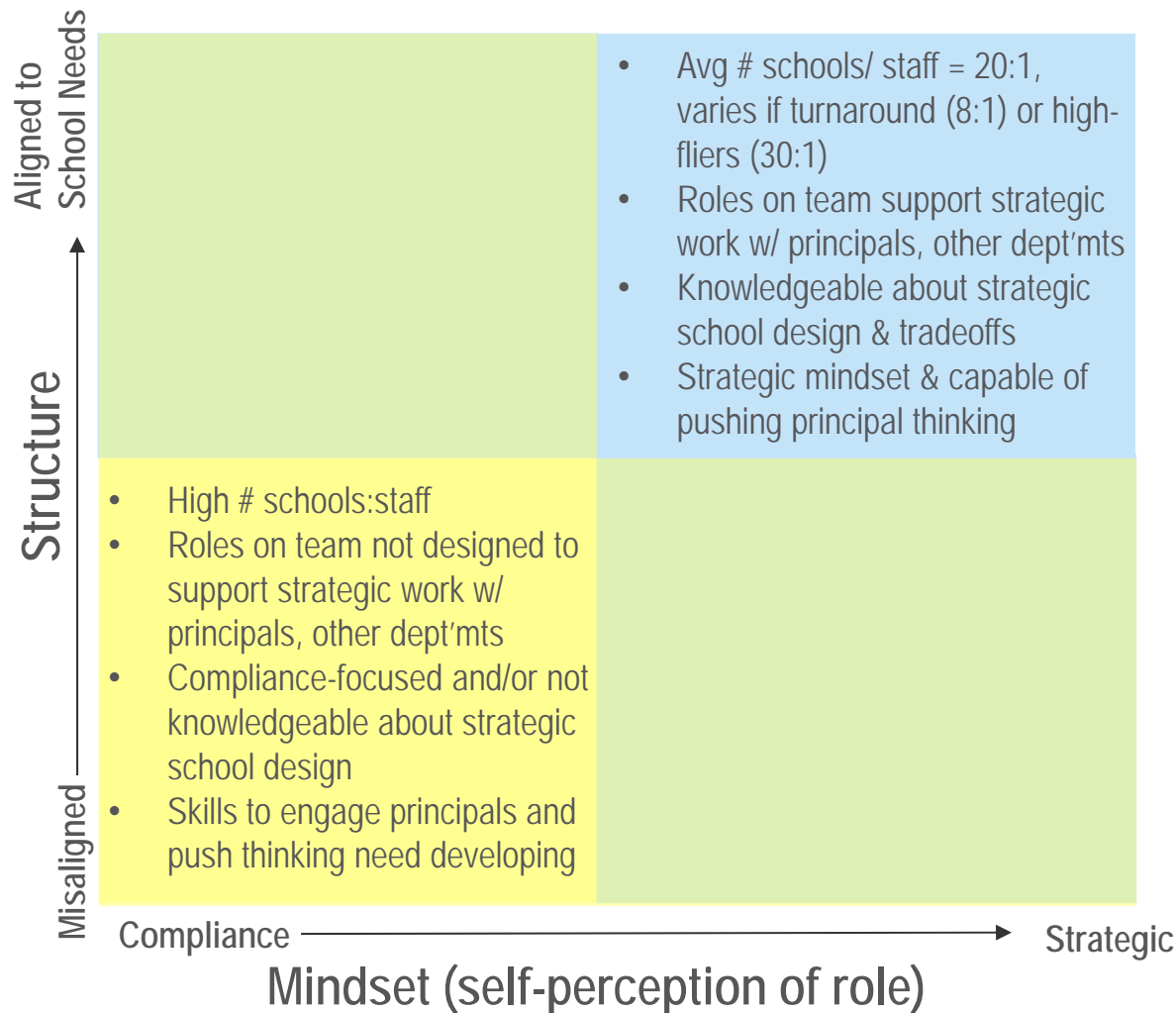
“Share information and school design strategies with our instructional division and explore ways to support instructional initiatives.”  
-Pedro Salcido, LAUSD

“I plan to apply the strategies used in the difficult conversations exercise. Often in our positions as financial partners we have difficult conversations with school leaders and/or departmental leaders.”  
-Nichelle Tarver-Hammons, Denver

“Engage school leaders in more strategic school design questions to identify budget opportunities.”  
-Evan Mellman,  
Denver

“Seek additional input from our peers in other districts”  
-Chuck Frankel, CMSD

# How would you assess your team's Structure & Mindset?



- **Structure:** Organized to support schools, with reasonable caseloads
  - # of staff
  - Roles that allow team to be strategic in how they support principals, work with other departments, etc.
- **Mindset:** The skills and drive to be strategic
  - Knowledge (strategic school design, tradeoffs)
  - Motivation, drive, and ability to push principal thinking

## Pair up and Problem solve: Prioritizing what you need

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1. Find 2 districts to work with (groups of 3)
2. Take **8 minutes per district** to share:
  - Your org structure (What roles do you currently have? What needs do those roles fill? What expectations, training, or new/different roles do you need to fill the gaps?)
  - Any additional context for your structure/mindset rating
  - What do you see as the biggest challenge/gap you are facing in aligning your team's skills and knowledge to your vision for how you'd like to support principals?
  - Brainstorm solutions & next steps together
3. Shareout: Any big aha's and/or one new insight or something you will do differently