

SBOs Share Their Thoughts: Essential Technical and Leadership Skills



By E. Glenn McClain Jr., Ed.D., and Richard A. King, Ph.D.

For years, school business officials' responsibilities included, as Knezevich and Fowlkes reported in 1960, "procuring, expending, accounting for, protecting, organizing, and maintaining fiscal and material resources in an efficient manner so that the human resources and efforts are aided in achieving educational goals."

Since then, school business officials' areas of responsibility have grown and changed. As former ASBO International Executive Director Anne Miller explains: "These are the people who are in charge of allocating resources in these hard economic times and with the implementation of No Child Left Behind. It's critical that you have someone in that role who not only knows the numbers side, but also the education side" (Archer 2003, p. 3).

As an important cabinet-level position that reports directly to the superintendent and board of education (Stevenson and Tharpe 1999), the school business official (SBO) often holds the second most powerful position in the district.

Along with calls for fiscal and educational accountability, this elevated stature underscores the need for business officials to have leadership skills to complement their critical technical skills.

Exploring Views of ASBO Members

Effective leaders help others build an organizational vision on a sense of purpose. They support others' accomplishments and work collaboratively to make necessary changes to promote an effective system (Fullan 2005; Kouzes and Posner 1987).

Clearly, SBOs agree that budget, financial resource management, administration, and compliance are the most essential skills.

To better understand the leadership skills that today's SBOs need in their evolving role, we surveyed hundreds of ASBO members. Our online survey asked respondents to identify the degree to which the identified skills are needed to fulfill their responsibilities. Possible responses were 1 (essential), 2 (somewhat essential), 3 (somewhat not essential), and 4 (not essential). Respondents could also indicate that a particular skill was "not applicable." The survey also asked about the SBO's gender, age, ethnicity, education, experience, career path, district size and type, and district collective-bargaining status.

All 4,350 subscribers to the ASBO Listserv received the survey by email. The overall response rate (18.4%) and primary demographic characteristics of respondents were similar to other surveys of ASBO members. The findings report the views of 743 SBOs from school districts in the United States.

The survey used the leadership domains of the Total Leaders model outlined by Schwahn and Spady (1998).

Their model includes five pillars of organizational change: purpose (it has meaning for me), vision (it's clear and exciting), ownership (I want to be part of it), capacity (I can do it), and support (our leader is helping us do it). The pillars translate into five leadership domains:

- Authentic leadership
- Visionary leadership
- Cultural leadership
- Quality leadership
- Service leadership

Three performance roles, in turn, describe how organizational leaders carry out each domain. The resulting 15 performance roles compose the leadership skill set in our research. We also used 33 technical skills based on ASBO's Professional Standards.

Ranking Technical and Leadership Skills

SBOs reported that 10 of the 33 technical skills listed were the most essential. The average ratings were 1.25 or less (see Table 1). The relatively low standard deviations indicate that SBOs agree that the first three technical skills are absolutely essential: analyze and manage budgets; gather and organize information; and prepare, analyze, and report financial information. It should be noted that average responses for all 33 technical skills fell between 1.04 and 2.16. Since no questions had mean results near 3.0 or 4.0, SBOs generally viewed each skill as at least somewhat essential.

Seven of the highest-rated skills fall within the financial resource management area of ASBO's Professional Standards:

1. Analyze and manage budgets
2. Prepare, analyze, and report financial statements
3. Present financial data
4. Forecast revenue sources

Table 1. Highest-Rated Technical Skills

	ASBO Standard	Mean	SD
Analyze and manage budgets	Resource management	1.04	0.194
Gather and organize information	Educational enterprise	1.05	0.220
Prepare, analyze, and report financial statements	Resource management	1.09	0.299
Present financial data	Resource management	1.10	0.319
Solve problems and resolve conflicts	Educational enterprise	1.11	0.338
Know and apply ethical frameworks	Educational enterprise	1.13	0.373
Forecast revenue sources	Resource management	1.16	0.395
Develop an operational plan	Resource management	1.22	0.437
Prepare a budget calendar	Resource management	1.24	0.465
Interpret school finance funding model	Resource management	1.25	0.513

Note: The table includes the 10 technical skills receiving the highest average ratings (1.25 or less). A complete list of skills and ratings can be obtained from the authors.

Table 2. Highest-Rated Leadership Skills

	Domain	Mean	SD
Model core organizational values and personal principles	Authentic	1.39	0.601
Develop change-friendly culture	Cultural	1.55	0.689
Support organizational purpose and vision	Service	1.61	0.702
Employ a client focus	Visionary	1.61	0.704
Restructure the organization	Service	1.61	0.724
Involve everyone in productive change	Cultural	1.69	0.681

Note: The table includes the six leadership skills receiving the highest average ratings (1.7 or less). A complete list of skills and ratings can be obtained from the authors.

5. Develop an operational plan
 6. Prepare a budget calendar
 7. Interpret school finance funding model
- The other three fall within ASBO's educational enterprise area:
8. Gather and organize information
 9. Solve problems and resolve conflicts
 10. Know and apply ethical frameworks

In contrast to SBOs' agreement that many technical skills are very essential, all 10 of the technical skills noted above were more highly rated than the highest-ranked leadership skill. The highest-rated leadership skill averaged 1.39.

SBOs view technical skills as more essential than leadership skills in their positions.

The six leadership skills that received the highest average ratings (less than 1.7) are detailed in Table 2. Although the respondents seemed to agree on the importance of technical skills, the standard deviations reveal greater disagreement among school business officials about the importance of leadership skills. This lack of agreement may relate to SBOs' beliefs that overall leadership responsibilities belong to the superintendent.

Overall, analysis of responses indicated an agreement in the perceived importance of seven technical skills and two leadership skills (see Table 3). Once again, the clusters of technical skills are deemed to be more essential (means closer to 1.0) than are the skills encompassing leadership.

Statistical analyses revealed no differences in mean responses on the basis of SBO or district characteristics. Responses to inquiries about the technical and leadership skills were quite similar when examined by gender, age, ethnicity, educational level, years of experience in current position, career path, district size, district type, state, district collective-bargaining status, and number

of years in the profession. Because none of the differences in responses were statistically significant, the findings suggest that ASBO members agree that technical skills are much more critical to their performance than are leadership skills.

Clearly, SBOs agree that budget, financial resource management, administration, and compliance are the most essential skills. These highly rated technical skill factors are much more important than the two leadership factors (organizational and inclusive). Organizational leadership skills focus on determining direction for the educational organization through various leadership activities. Inclusive leadership skills include activities that help employees support and participate in the direction and leadership of the organization. In addition, the human resources management factor was rated as somewhat essential.

Comparing Skills with ASBO Standards

The technical and leadership skill factors differ somewhat from ASBO's Professional Standards and the Total Leaders performance roles. The ASBO Professional

Table 3. Skill Clusters

	Mean	SD
Technical skill factors		
Budget	1.0451	0.16919
Financial resource management	1.2065	0.25786
Administration	1.2696	0.50198
Compliance	1.2743	0.31615
Information management	1.6283	0.54182
Support services	1.7261	0.53488
Human resource management	2.0331	0.60647
Leadership skill factors		
Organizational leadership	1.6828	0.55572
Inclusive leadership	1.7353	0.58429

Table 4. ASBO Standards and Skill Factors

ASBO Professional Standards	Factors from SBO Survey
Educational enterprise	Administration
Financial resource management	Financial resource management
Human resource management	Human resource management
Facility management	Compliance
Property acquisition and management	Budget
Information management	Information management
Ancillary services	Support services
Total Leaders Domains	
Authentic leadership	Organizational leadership
Visionary leadership	
Cultural leadership	Inclusive leadership
Quality leadership	
Service leadership	

Standards are listed at the top left of Table 4, and the seven factors are at the top right. There are some differences between the standards and skill factors. For example, ASBO’s financial resource management standard is segmented into three technical skill factors: budget (analyzing and managing resources), compliance (following generally accepted accounting principles, Governmental Accounting Standards Board, and audit compliance), and financial resource management (accounting, record keeping, managing cash flow). Two ASBO standards, facility management (operations and maintenance) and ancillary services (food service and transportation), are represented in only one support services factor.

The bottom left of Table 4 lists five domains of the Total Leaders model, and the two factors resulting from this study of SBO views appear on the bottom right. Two of the Total Leaders performance roles (authentic and visionary leadership) become the organizational leadership factor, and the other three (cultural, quality, and service leadership) join in inclusive leadership.

Improving ASBO Standards and SBO Skills

Based on the results of this survey, we conclude that SBOs view technical skills as more essential than leadership skills in their positions. They agreed strongly that budget and financial management skills are the most essential skills. Further analysis suggests a modification in the ASBO Professional Standards. The standard currently labeled “financial resource management” would better highlight essential skills if it were subdivided into three areas: budget, compliance, and financial resource management.

Many respondents thought leadership skills were important, but SBOs were not strongly aligned regarding

the importance of leadership skills. Because SBOs are critical members of districts’ leadership teams, and because they need to have an effective voice in making strategic decisions, we believe ASBO should make leadership skills a stronger component of the professional standards.

Interestingly, there were no significant differences between responses of men and women or among those of different years of experience, large and small districts, and so on. We believe that despite the small response rate, it is possible to make recommendations for improving technical and leadership skills of SBOs in all school districts.

Examining the technical and leadership skills can be helpful to current SBOs as they tend to their own professional development; to districts as they recruit, screen, and interview candidates for the school business officer position; and to superintendents as they evaluate current SBO performance and consider skills in relation to responsibilities and future leadership roles.

ASBO and other state and national professional organizations should consider technical and leadership skills when determining topics for professional development. SBOs’ reports that leadership skills are less essential may reflect less self-confidence in performing those responsibilities. If so, there may be a market for workshops centered on leadership skills, ethics, and accountability in all areas of school operations.

Those who decide what skills and standards compose SBO qualifications or states’ certification and credentialing criteria might consider a blend of technical and leadership skills. Universities that offer degree or certification programs for SBOs might also ensure that leadership skills are represented along with technical skills when planning course content and internship experiences in business offices.

Looking to the Future

Many unanswered questions remain about the essential skills for current and future SBOs. Future research might be designed as follows:

- Interview and observe SBOs' behavior on the job to understand the degree to which they demonstrate technical and leadership skills in effective performance.
- Seek superintendents' reports of essential SBO skills to understand whether they think SBOs should develop leadership skills or focus only on technical skills.
- Design better studies of SBOs to understand differences in how demographic groups view skills. If, for example, beginning SBOs view skills in different ways from more experienced SBOs, then ASBO and professional organizations can better address respective group needs through focused training programs.
- Plan periodic surveys to assist ASBO in understanding trends in SBO views, revise standards accordingly, and encourage future professional development activities.

For the first time in many years, we now have research-based information on which to continue studying essential skills for school business officials. Now is the time for national and state professional associations to capitalize on this research and use it to continue to improve these organizations and our professional development in the coming years.

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