



- ▶ **Effective Succession Planning**
- ▶ **Sharon Chuculate, Business Manager**
- ▶ **Clarksville School District, Clarksville AR**
- ▶ **April 5, 2022**
- ▶ **SASBO Conference**

## **WHO'S ON DECK?**



## BACKGROUND

Imagine replacing  
100% of your team, at  
once.

Purchasing, retired  
March 12; had been  
with the district 22 years

Accounts payable,  
retired June 30; had  
been with the district  
17 years

Payroll/HR, resigned  
March 31; had been in  
her position 2 years

We had no job  
descriptions, we had  
nothing showing what  
they did, when they  
did it, how they did it,  
etc.



Where Do We Begin?



- ▶ We had to create job descriptions.
- ▶ Call your friends.
- ▶ Search the “Electronic Resource Center” on SASBO website.
- ▶ ASBOi Discussion Posts
- ▶ Google.





**WEBSITE (WE  
USE TALENT ED)**



**AAEA JOBSITE  
SERVICE**



**FMS LISTSERV**



**CALL YOUR  
FRIENDS**



**PAID SERVICES**

**ADVERTISE OPENINGS**





# PICK YOUR TEAM

Accounts Payable-28  
Applications  
Received, we  
interviewed 4

Purchasing-29  
Applications  
Received, we  
interviewed 5

Payroll/HR-we did not  
advertise, interviewed  
4 applicants from  
Purchasing and AP  
applicant pool



## Know What You Want.

- Attendance?
- Why are they looking for a change?
- In it for the long-haul?
- Potential For Growth?
- Is there something you want to impress upon your candidates? For me—improved customer service from the Finance office.

## Call on References.

Personalities mesh?

What does your gut say?

## THE STARTING LINE UP





# HOW I HIT MY HOMERUN





All three of my new hires started on the same day.

We trained together in the conference room for several weeks.

We all did payroll together.

We all did requisitions together.

We all did AP processing together.





Turnover of Staff

Emergency Situations

Reliable  
Backup/Assistance

Helps with internal  
controls

Provides an opportunity  
for advancement

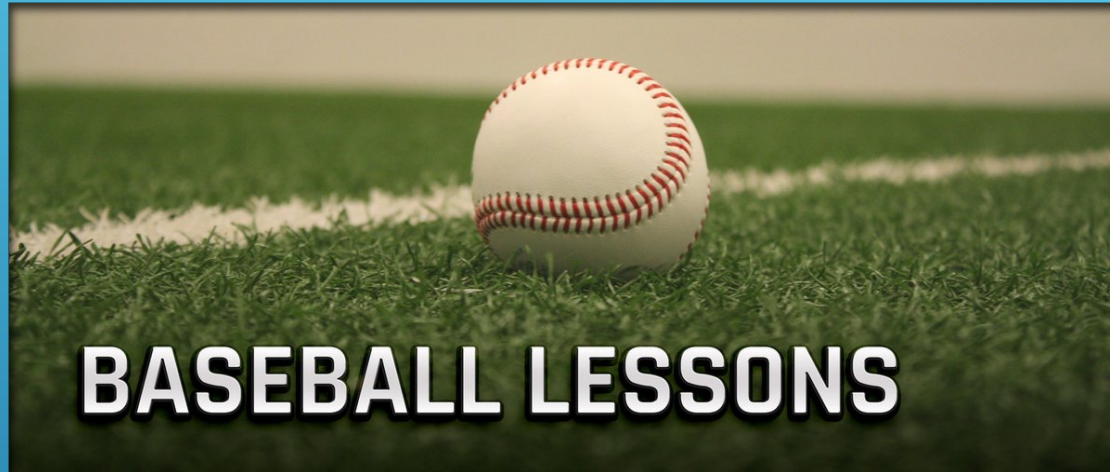
Collaboration

# WHY CROSS TRAIN



**When they don't  
know what you  
do, they make  
up what you do.**





# CONTENTS

## Job Descriptions

Daily, Monthly, Quarterly, Annual task lists

Deadlines

Then, write step by step instructions for each task.

Each person is responsible for submitting instructions for their job duties.

Use the instructions on the APSCN website, but add your own notes, tips, tricks.

Be specific—the reader won't know all your acronyms, menu options, etc.

Use Screenshots.

# SPECIFICS TO INCLUDE

- ▶ Everything, start to finish.
- ▶ General Job Duties
- ▶ Accounts Payable
- ▶ Mail
- ▶ Mileage
- ▶ Bank Reconciliation
- ▶ Payroll Checklist
- ▶ Monthly Reports
- ▶ Quarterly Reports
- ▶ Manuals (coding, etc.)

# BASEBALL

## HOW TO PLAY THE GAME



UNIVERSE

THE OFFICIAL PLAYING AND  
COACHING MANUAL OF  
MAJOR LEAGUE BASEBALL



# WHAT DOES IT LOOK LIKE?



**It depends on your staff.**

**It should be a “living, breathing, document” that changes with Software, etc.**

**We use Microsoft Teams to share documents.**

# IT MAY LOOK LIKE THIS--

- ▶ Electronic handbooks shared amongst staff means everyone is seeing the same thing.
- ▶ Updates are available always.
- ▶ You can see the last update.
- ▶ Easily shared with others, including the auditor.

...und Balances & Fund Classification...	7/20/2021 7:06 AM	Microsoft Word D...	24 KB
...IN Posting of Receipts.docx	2/25/2021 12:18 PM	Microsoft Word D...	15 KB
FIN PTO's and Booster Clubs.docx	2/25/2021 12:19 PM	Microsoft Word D...	15 KB
FIN Receipt and Deposit of Funds.docx	6/25/2021 7:27 AM	Microsoft Word D...	18 KB
FIN Replacement or Reimbursement for ...	2/25/2021 12:24 PM	Microsoft Word D...	14 KB
FIN Ticketed Event Receipt Procedures.d...	2/25/2021 12:44 PM	Microsoft Word D...	15 KB
HR Bus Driver Pay for Non Route Trips.do...	2/25/2021 11:54 AM	Microsoft Word D...	13 KB
HR Employee Attendance.docx	7/18/2021 2:14 PM	Microsoft Word D...	14 KB
HR Employment Verification.docx	7/18/2021 2:15 PM	Microsoft Word D...	12 KB
HR FMLA.docx	7/18/2021 2:06 PM	Microsoft Word D...	13 KB
HR KELLY EDUCATION SUPPORT.pdf	7/19/2021 8:35 AM	Adobe Acrobat D...	84 KB
HR Leave Forms.docx	2/25/2021 12:14 PM	Microsoft Word D...	14 KB
HR Timesheets.docx	7/18/2021 1:32 PM	Microsoft Word D...	15 KB
HR Workers Compensation.docx	2/25/2021 12:46 PM	Microsoft Word D...	14 KB
Index 1 Attorney General Opinion 91-411....	2/25/2021 10:51 AM	Adobe Acrobat D...	24 KB
Index 3 Contact Information.docx	7/18/2021 1:52 PM	Microsoft Word D...	14 KB
Index 3 Sales Tax Rules.pdf	2/25/2021 12:33 PM	Adobe Acrobat D...	764 KB
Index 4 Financial Accounting Handbook....	5/29/2021 6:27 PM	Adobe Acrobat D...	2,209 KB
Index 5 Intro_to_Purchasing.pdf	7/18/2021 12:26 PM	Adobe Acrobat D...	1,709 KB
Index 6 Tier I 2021-2022.pdf	7/18/2021 12:33 PM	Adobe Acrobat D...	3,713 KB
Index 7 ASBA FMLA Presentation.pptx	7/18/2021 1:55 PM	Microsoft PowerP...	4,714 KB
Index 8 Ethics Rules DESE.pdf	7/18/2021 2:16 PM	Adobe Acrobat D...	231 KB
Index 9 RCPT SAMPLE.pdf	7/18/2021 2:26 PM	Adobe Acrobat D...	235 KB
Index 10 DEP TICKET SAMPLE.pdf	7/18/2021 2:26 PM	Adobe Acrobat D...	385 KB
Index 11 Activity Fund Deposit Sheet.pdf	7/18/2021 2:27 PM	Adobe Acrobat D...	320 KB
PUR Bid Process.docx	7/18/2021 2:33 PM	Microsoft Word D...	14 KB
PUR District Credit Cards.docx	7/18/2021 2:12 PM	Microsoft Word D...	15 KB
PUR Employee Travel.docx	7/18/2021 2:02 PM	Microsoft Word D...	14 KB

# TRY OUTS

- ▶ **Test it!**
- ▶ **Have your AP work on a payroll.**
- ▶ **Have your Payroll work on an AP run.**
- ▶ **Have purchasing work with Payroll.**
- ▶ **Have them do this periodically so that they are comfortable with the process.**







## LESSONS LEARNED



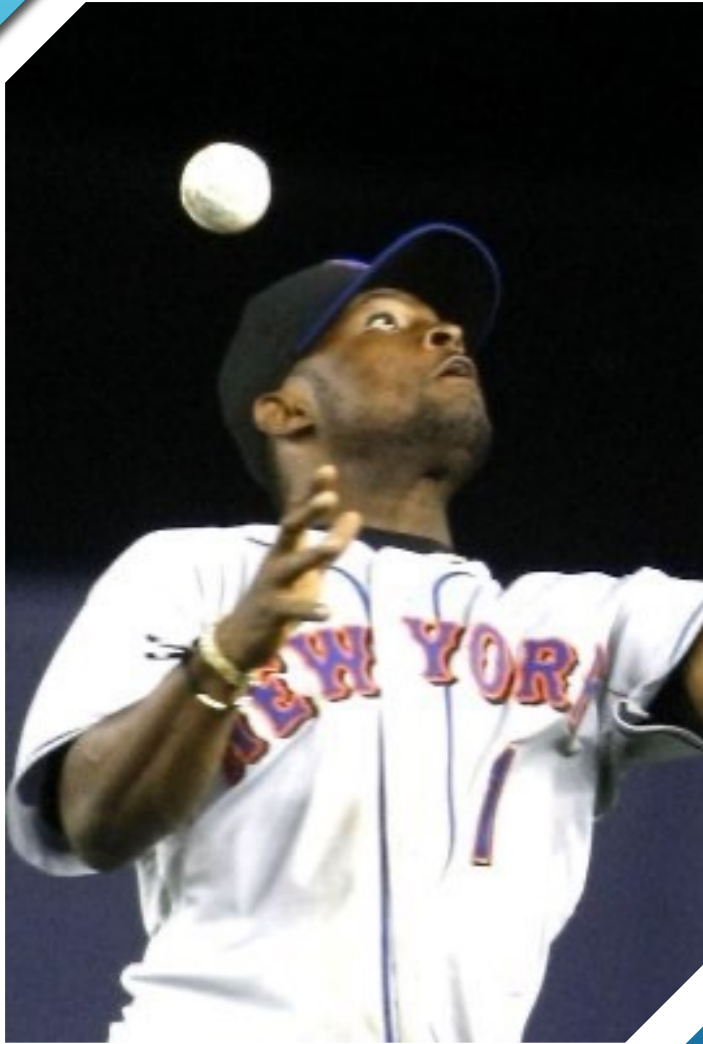
CONTINUALLY  
UPDATE/REVISE  
/IMPROVE.



TAKE TIME TO  
TALK ABOUT THE  
PROCESSES AS A  
GROUP.



THIS TAKES TIME  
BUT IS  
IMPORTANT.



---

Smaller district, payroll person passed away suddenly in December.

---

There was no one to process W2's, 1095's.

---

In January, there was no one who knew how to process payroll.

---

The district brought in a retired Business Manager.

---

They used time keeping software that was not familiar to anyone.

---

**LEARN FROM OTHER'S**

Several white diagonal lines of varying lengths and thicknesses are positioned on the right side of the slide, extending from the middle towards the bottom right corner.





# TRANSITION PLANNING



# WHAT TO PREPARE

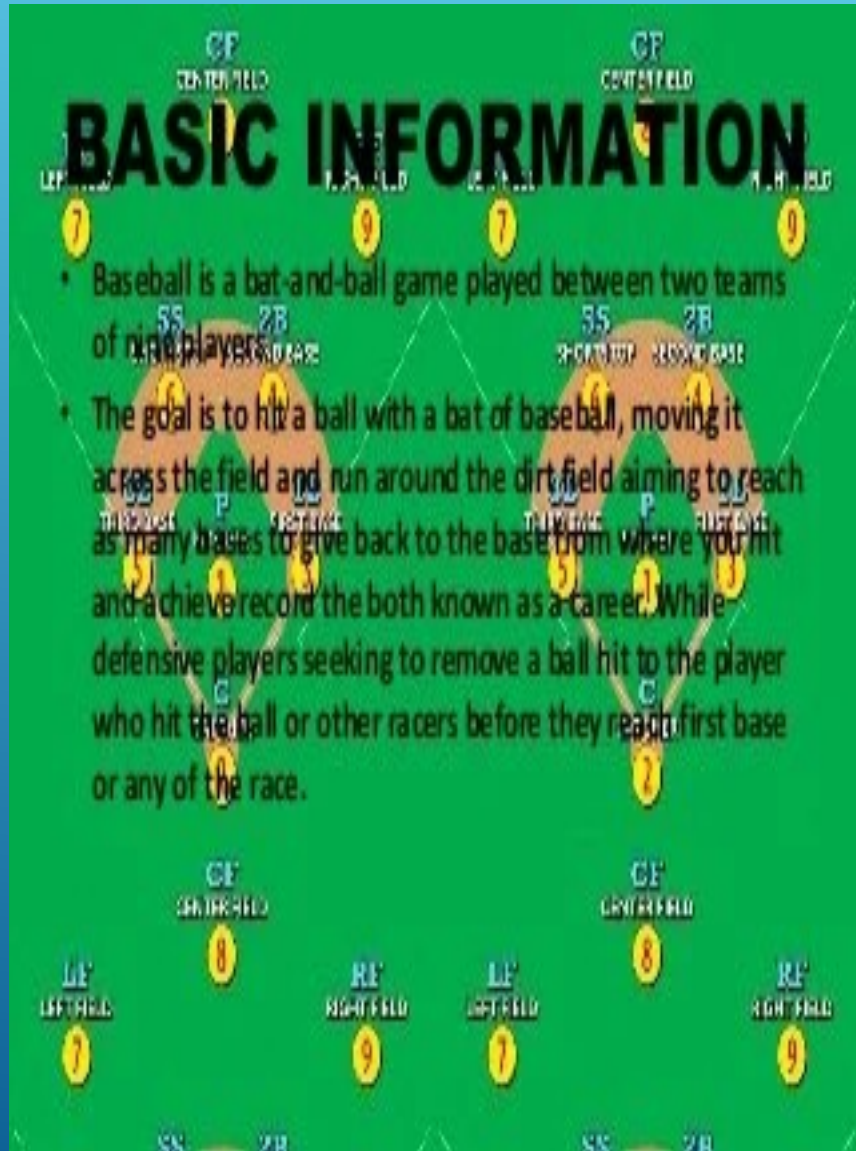


- ▶ **Monthly tasks and deadlines**
- ▶ **Common websites and how to get access/passwords**
- ▶ **Monthly journal entries, payments, etc.**
- ▶ **Leave access to your documents, drives, etc.**
- ▶ **Information on construction projects, debt schedules, etc.**
- ▶ **Who are your contacts? Bank, bonds, vendors, etc.**

# WHERE TO START

- ▶ **Critical dates**
- ▶ **Google or Outlook Calendar**
- ▶ **Details**
- ▶ **Tasks in Outlook**





Federal  
Tax ID

State  
Tax ID

DUNS  
Number

ATRS  
Number





## Set up

introductory meetings with key personnel when possible.



## Have

your email auto-forwarded to your successor.



## Arrange

for transition days to work together.



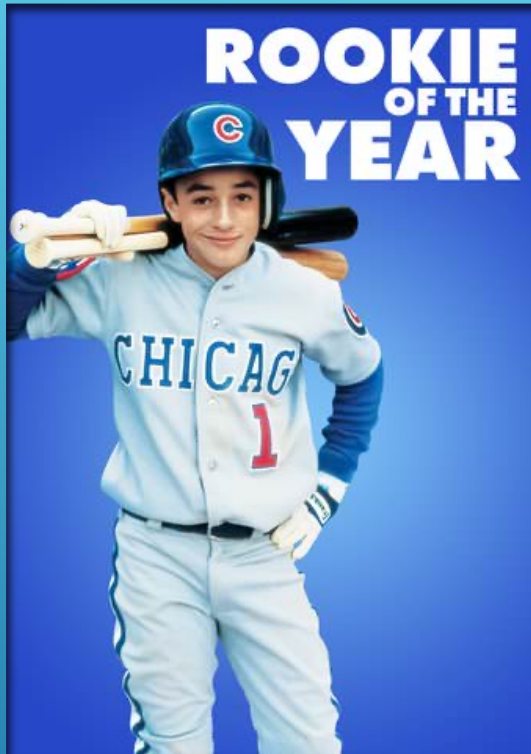
## Maintain

communication after you leave for assistance.

# EQUIP FOR SUCCESS

**Their success is a  
reflection on you.**

Three parallel white lines of varying lengths are positioned in the bottom right corner of the image, slanted diagonally upwards from left to right.



# IF YOU ARE THE ROOKIE

---

Take time to observe the current systems and processes.

---

Gain the trust of your staff; learn from them.

---

Slowly introduce changes you would like to implement by showing the staff the potential advantages—time saving, efficiency, better customer services, etc.

---

Example—importing timecards, attendance, etc.

---

Be active in your Associations—AASBO, SASBO, ASBOi

---

Join the mentoring group

---

Attend Co-op meetings/sessions

---





**YOU'RE OUTTA HERE**

- ▶ **Sharon Chuculate**
- ▶ **1701 W Clark Road**
- ▶ **Clarksville AR 72830**
- ▶ **Office 479-705-3201**
- ▶ **Cell 479-970-9663**
- ▶ **[Sharon.Chuculate@csdar.org](mailto:Sharon.Chuculate@csdar.org)**

**CONTACT**

