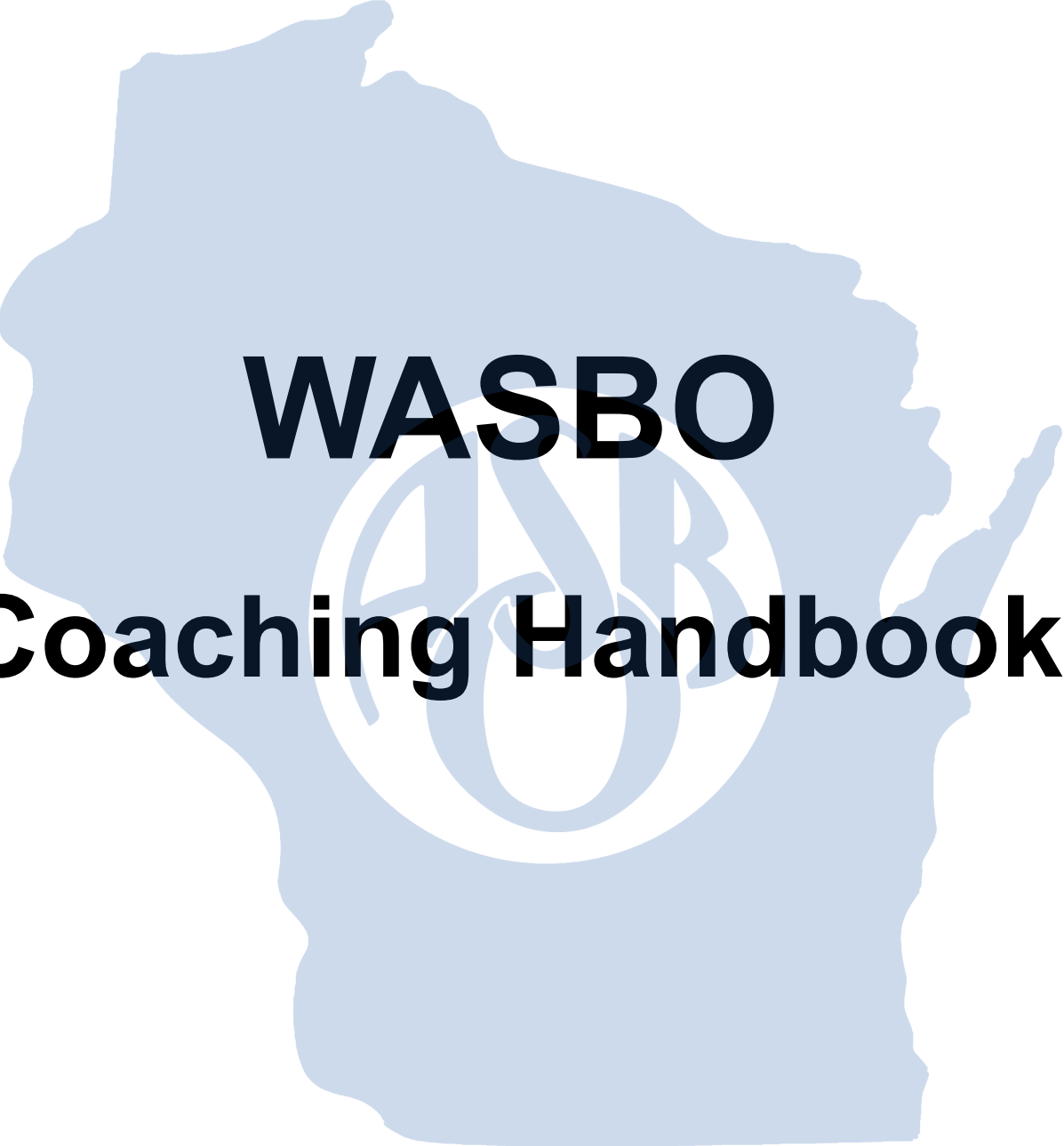




WASBO

Coaching Handbook

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WASBO Coaching Handbook

WASBO Coaching Program and Introduction

Coaching has been and continues to be an accepted and successful practice and powerful tool for training professionals and supporting adult learning in business and industry, education, and many other professional fields. While the approaches and level of sophistication may vary from program to program, the desired outcomes of successful programs are generally the same and focus on strategies that assist individuals to be or become more effective within the context of their organization.

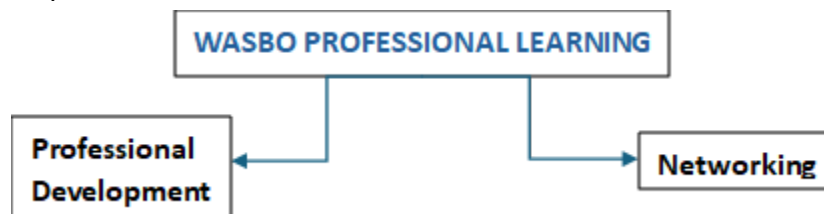
The purpose of the WASBO coaching program is to support school business and facility personnel by offering personalized opportunities to enhance their professional knowledge, skills, and leadership abilities while growing their network of professional relationships. Participation in the coaching program equips Wisconsin public school business and facility personnel with the tools and confidence to make informed decisions that positively impact their schools and communities. The program delivers tailored guidance focused on strengthening financial management, facility planning, and operational efficiency. Furthermore, the coaching program fosters a community of practice among WASBO members, promoting knowledge sharing and mutual support. All of this aligns to the mission and goals of WASBO to best serve its members.

WASBO Mission

To provide **professional development**, to foster a **network** of support and to **advocate** for funding that ensures outstanding educational opportunities for all children in Wisconsin.

WASBO Professional Learning Overarching Goal:

WASBO will advance the highest standards of performance in school business management in every school district through professional learning that supports career-long growth and builds collegial relationships.



SECTION I: Coaching Relationships

No two coaching relationships are the same; the relationship established between a coach and coachee is uniquely based on the needs, personality, learning styles, and experiences each person brings to the relationship. Coaching can provide one or all of the following: regular opportunities for individuals to reflect together about their hands-on work; an opportunity for skill development measured in competencies gained; a significant, long-term effect on the life or work style of another person.

Successful coaching relationships usually benefit everyone involved – the coachee, the coach, and the profession.

Benefits to the Coachees

- One-on-one attention from a professional who is willing to support your unique professional needs
- Opportunity to share ideas with someone else in the profession
- Guidance and helpful feedback in the development as a professional
- New and/or different perspectives
- Assistance with the integration of knowledge and skills learned from conferences, workshops and reading materials
- An opportunity to build a network of contacts in the field and network within the professional community

Benefits to the Coach

- Opportunity to expand their leadership capabilities
- Opportunity to expand communication and listening skill set
- New and/or different perspectives
- Renewed enthusiasm for the role of the experienced professional
- Enhanced skills in coaching and modeling

Responsibilities of Coaches

Successful coaches share many common characteristics or traits. They are experienced and possess a willingness to facilitate learning and development. These coaches demonstrate a positive attitude and act as a positive role model exhibiting enthusiasm for the profession. Effective written and verbal communication, as well as ongoing personal and professional goals, are present. Most importantly, they foster, convey and uphold the standards, norms, and values of the profession including the WASBO Code of Ethics.

Professional Coaching Expectations

WASBO coaches are expected to meet the following expectations:

1. **Build Rapport**

Establish a trusting and respectful relationship with the coachee by demonstrating

genuine interest, empathy, and understanding. A strong rapport fosters open communication and mutual respect, setting the foundation for a productive coaching partnership.

2. Listen Actively

Engage in focused and attentive listening to understand the coachee's perspective fully. This involves acknowledging verbal and non-verbal cues, summarizing key points, and avoiding interruptions to create an environment where the coachee feels heard and valued.

3. Promote Self-Reflection and Learning

Ask insightful and thought-provoking questions that encourage the coachee to explore their thoughts, feelings, and actions. Facilitate productive struggle and critical thinking to help the coachee arrive at their own solutions and insights, fostering personal growth and autonomy.

4. Provide Constructive Feedback

Deliver feedback in a clear, specific, and respectful manner. Highlight areas of strength and opportunities for improvement, offering actionable suggestions to support the coachee's development and progress toward their goals.

5. Facilitate Goal Setting and Action Planning

Collaborate with the coachee to define clear, realistic, and measurable goals. Support them in creating actionable steps and timelines, ensuring alignment with their personal and professional aspirations.

6. Maintain Confidentiality

Uphold the confidentiality of coaching conversations to ensure a safe and trusted environment. Information should remain private unless there is an indication of harm to self, others, or ethical breaches that negatively impact the school district. In such cases, consult the WASBO Coaching Coordinator for guidance.

7. Operate Ethically

Demonstrate integrity and ethical behavior in all coaching interactions. Model ethical standards by offering guidance based on best practices and prioritizing the well-being of the coachee, their team, and the school district.

SECTION II: Coaching Program Operation

While it is recognized that relationships built during a coaching experience may continue indefinitely, the Coaching Program is designed to exist for one school year.

If interested in becoming a coach or having a coach, please submit an application form found on the WASBO website.

Participation Cost & Structure

Any WASBO member that has been in their role for three or more years may apply to be a coach. The role should be of similar title/responsibility, but may be in more than one location in the three or more years of experience. Those applying to be a coach will need to have their supervisor approve of their coaching role. This is completed in the application process.

Any other WASBO member can choose the cost and structure to have a coach that works best for them. Options include:

- In-Person Coaching
 - Monthly
 - Structure: Meet for one hour per month at an agreed upon location between coach and coachee
 - Cost: \$1500 for one school year
 - Every other Month
 - Structure: Meet for one hour every other month at an agreed upon location between coach and coachee
 - Cost- \$800 for one school year
- Virtual Coaching
 - Monthly
 - Structure: Meet for one hour virtually per month
 - Cost: \$1000 for one school year
 - Every other Month
 - Structure: Meet for one hour virtually every other month
 - Cost: \$550 for one school year

Trained coaches will be compensated for their time as identified in the agreed upon structure explained above and is properly logged. For example, if the coaching relationship is in-person every month, coaches will be paid for one hour per month as properly documented in the coaching log.

The coaching log will be shared with coaches at the start of each school year. Coaches compensation will be \$80 per hour plus mileage (mileage applicable only to in-person coaching and will be reimbursed at the state standard reimbursement rate for that year).

Coaching Training

Coaching training will be provided to coaches. Coaches that have never been a coach with WASBO are expected to participate in a training session. Topics covered in the training, but not limited to, include:

- Coaching vs Mentoring*
- Expectations of Coaching*
- Participation Cost & Structure*
- Handbook review (practical tips, timeline for suggested activities)
- Wisconsin School Business Official Standards & use of self-reflection tool in coaching*

In addition to the training, optional quarterly one hour virtual training will be available for all coaches to continue their professional growth as coaches. While optional, these are a good opportunity to network with other coaches and develop strong coaching skills.

Practical Tips for Coaches

We often think commitment and action are all it takes to make good things happen. Research shows, however, that effective coaching takes much more. To help these efforts be successful, here are some practical tips for coaches:

1. *Always be honest.* Trust and respect are the foundation on which coaching relationships are built.
2. *Avoid being judgmental of a colleague's situation.* Acceptance without conditions communicates that your concern comes without strings attached.
3. *Support, but don't do the job of your coachee.* Don't do for a colleague what she/he can do for him/herself. There are times that technical assistance may need to be provided which is completely acceptable. However, when these needs arise, teach how to complete the task with the coachee doing the work so that it will be replicable in the future.
4. *Don't expect to have all the answers.* Sometimes just listening attentively is all people need.
5. *Help your colleague access resources and expand support networks.* Discuss the importance of maintaining positive relationships. Encourage engagement in networking and learning opportunities such as regional meetings and WASBO professional learning opportunities.
6. *If the relationship seems to stall, hang in there.* Often those seeking a coach are in need of support, but can struggle to continually seek support when workload increases. It is recommended that you set up the next coaching session at the end of each session. If the coachee repeatedly cancels or becomes non-responsive to communication, reach out to the WASBO Coaching Coordinator to assist.

Suggested Timeline and Activities

The coaching relationship should dictate the direction of each coaching session, however if a coach is looking for suggested topics for discussion below are ideas and a related timeframe for consideration.

Timeline	Possible Coaching Topics
August-September	• Identify general and specific goals • Balancing the demands of private and professional activities • Time management skills for leadership efficiency

	• Identifying priorities • Developing effective practices with internal office staff • Developing relationships with new staff • Budget finalization and monitoring • Ensuring facilities are prepared for student and staff return • Reviewing safety and security protocols • Managing transportation, food services, and logistics • Ensuring compliance with updated regulations and policies • Understanding funding streams and grants
October-November	• Assessment of performance at completion of first quarter of the school year • Maintaining balance between professional and personal activities • Dealing with staff challenges • Identifying and mitigating financial, operational, and safety risks • Crisis management and emergency response planning • Process improvement strategies • Transparency, accountability, & workflow automation for business operations • Delegation and prioritization techniques
December-January	• Effective communication with school leadership, staff, and community • Building positive relationships with vendors and service providers • Handling difficult conversations and negotiations • Effective leadership strategies for school operations • Coaching and mentoring staff for professional growth • Conflict resolution and team collaboration techniques • Employee engagement and motivation
February-March	• Planning for the upcoming year while completing the current year • Preventative & long-term maintenance planning • Managing contractors and service agreements • Long-term capital improvement planning • Using data analytics for decision-making
April-June	• Year-end financial closeout and reporting • Conducting internal audits and compliance reviews • Reviewing policies and procedures for efficiency • Preparing financial documentation for the next fiscal year

	• Evaluating team performance and setting development goals • Reviewing successes and lessons learned from the school year • Updating strategic plans for the next cycle • Recognizing achievements and celebrating successes
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First Year Academy

First Year Academy participants will likely need more technical support. The following suggested topics are ideas to support coaching sessions with first year school business professionals and building and grounds staff. These are not exhaustive lists, but provide a sampling of topics that may rise in priority at various times throughout the year.

Timeline	Business Office Topics	Building & Grounds Topics
August-September	• Review WASBO School Business Calendar • Complete/Review Audit • Finalize budget, prepare for budget hearing • Complete DPI reports • Verify all supplies are ordered for the start of the school year • Finalize transportation contract, bus routes, Special Ed. Trans., resolve any conflicts • Analyze cash-flow for potential need for borrowing • Review liability, property insurance renewal • Prepare payroll data for workers compensation audit • Oversee completion of summer maintenance projects	• Finalizing and managing summer facility upgrades • HVAC system inspections and preventative maintenance • Outdoor grounds maintenance and landscaping projects • Reviewing long-term capital improvement plans • Ensuring all building systems are operational for staff and student return • Deep cleaning protocols and sanitation standards • Safety checks for playgrounds, athletic fields, and outdoor spaces • Conducting security system tests and key control audits • Managing maintenance and operations budgets • Forecasting future facility expenses • Optimizing utility costs and energy efficiency initiatives • Reviewing procurement processes for equipment and

		supplies
October-November	• Amend budget/finalize levy in October • Certify levies to municipalities • Monitor purchasing, schools compliance with bidding procedures • Monitor cash-flow/investment	• Conducting safety audits and emergency preparedness drills • Reviewing security camera systems, access controls, and visitor protocols • Cold-weather maintenance to prepare for Wisconsin's winter weather • OSHA and EPA compliance reviews • Conducting energy audits and tracking usage data
December-January	• Prepare next year's budget calendar • Prepare revenue projections and estimate expenditures • Distribute budget information to building administrators • Review maintenance needs with Building & Grounds Coordinators • Review technology needs for upcoming year	• Ensuring heating systems and boilers are functioning efficiently • Snow and ice removal planning and execution • Staff training on building operations and maintenance best practices • Coaching custodial and maintenance teams for efficiency
February-March	• Continue work on next year's budget • Review employee handbooks • Review current year expenditures and estimate unexpended funds in large budget areas (utilities, transportation, salaries, benefits, etc.) • Review grant expenditures to ensure compliance and acceptable carry-over	• Monitoring HVAC systems for air quality improvements • Proper chemical storage and handling compliance • Planning for spring maintenance and repairs • Using data analytics for preventative maintenance scheduling

	• Prepare enrollment projections	
April-June	• Communicate with staff – retiring, laid off, or resigning regarding benefits • Evaluate Business Office staff • Obtain insurance renewals • Process purchase orders for materials for the start of next school year • Review school lunch fees for the upcoming school year • Finalize budget & present preliminary budget to Board • Review and renew any contracts with vendors and or providers • Prepare for audit • Evaluating accomplishments and identifying areas for improvement • Updating policies and procedures for the next school year	• Preparing for spring landscaping and field maintenance • Assessing drainage and irrigation systems • Playground safety inspections and repairs • Evaluating parking lots, sidewalks, and exterior lighting • Reviewing facility needs and prioritizing projects for the next year • Conducting building condition assessments • Updating long-term maintenance and improvement plans • Finalizing summer project planning • Evaluating accomplishments and identifying areas for improvement • Updating policies and procedures for the next school year • Reviewing vendor contracts and service agreements

SECTION III: Code of Ethics and Standards

WASBO Code of Ethics

High standards of ethical behavior for WASBO members are essential and compatible with the purpose of public education and to their commitment to leadership in the continuing improvement of the educational enterprise. To that end, WASBO members shall pledge to:

- Honor the public trust of the position above any economic or social rewards; not permit considerations of private gain nor personal economic interest to affect the discharge of their professional responsibilities; and recognize that the schools are the public's business and seek to keep the community informed about its schools.
- Accept responsibility for mastering, contributing to and sharing in the growth of specialized knowledge, concepts, and skills which are necessary to perform their duties.

- Perform and direct the Business Functions of the district in full support of educational opportunities provided to all in the district.
- Adhere to local, state and national laws.

WASBO Belief Statements

- We have a responsibility to develop school business professionals who are visionary educational leaders.
- In being committed to high quality performance, professionalism and ethical standards in all endeavors of the Association.
- We have a responsibility to provide the infrastructure for the delivery of quality educational programs for students.
- In advocating the concept that every child is entitled to a quality education supported by comprehensive school funding systems that are stable, adequate and equitable.
- School Business Officials play a key role in the responsible, equitable and effective use of resources available to educate children.
- We should foster communication by providing networking opportunities, continuing education and training for members and non-members to address the needs of lifelong learners.
- Continuous improvement should be fostered by information, critical evaluation and reflection.
- Enhanced leadership is promoted by mentorship among our members.
- There should be strong alliances among educational organizations.

WASBO School Business Official Standards

The Wisconsin School Business Official Standards delineate the knowledge and skills of effective school business officials. These standards are not minimal expectations, but a framework for business officials to construct additional knowledge and practical skills for their district. Business officials who work within these standards should expect to see higher performance for themselves and their districts. These standards convey the expectations, practices, and roles that the profession expects school business officials to contribute to an effective and collaborative environment that cultivates high achievement for all students. The full standards and supporting resources can be found at <https://www.wasbo.com/fisc1>.

Wisconsin Standards Self-Assessment: School Business Managers

The tool that follows was created using the standards as the base for self-assessment by an individual school business manager. Any questions to which a business manager responds at levels 1, 2, or 3 may be areas for growth and further professional development. Please note that school business managers operate in different capacities from district to district, and although these standards are the mainstay of their roles and responsibilities, every business manager has roles and responsibilities that are unique to their school district that may or may not appear in this tool.

This tool can be used with coachees who are school business managers to help identify areas for growth. It is recommended using this early in the coaching cycle to help identify goals. This document can also be found in the full standards document found at <https://www.wasbo.com/fiscl>.

Consider each of the statements below. Choose the response that most accurately represents your performance.

Standard Category 1: Financial Management

1.1- I establish clear budget priorities and parameters and build an accurate, reliable, and adaptable district budget	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.2- I forecast the impact of revenue sources available to the school district from local, state, federal governments, and other sources	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.3- I recognize and analyze significant social, demographic, and economic changes that may affect the financial plan	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.4- I allocate resources in alignment with long-term budget planning	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.5- I implement and assess resource allocation to ensure alignment with district goals	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.6- I use financial tools, like fund balance reports, to monitor and assess the district's financial health	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.7- I implement a legally compliant system of internal controls for cash management, reconciliations, and disbursements	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.8- I design and manage business office responsibilities to ensure effective checks and balances	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.9- I ensure legal compliance and accountability for all financial and physical assets, including fixed assets	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.10- I execute comprehensive financial risk management strategies, including regular risk assessments	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.11- I ensure purchasing decisions are legally compliant, consistent with district policy, and meet allowable use and other stipulations	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

1.12- I develop and manage investment strategies to protect assets and maximize income	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.13- I develop, maintain, communicate short and long-term debt management strategies to maintain financial sustainability	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.14- I report the district's financial status to state agencies in the required format and by established deadlines	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
1.15- I engage in an external audit process, respond to the audit findings, and share the audit report with the school board and public	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

Standard Category 2: Improvement

2.1- I contribute to a strategic plan that aligns resources with teaching and learning goals to maximize student achievement and fulfill the district's mission	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
2.2- I analyze data and recommend actions for executing, monitoring, and evaluating a strategic plan	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
2.3- I promote a professional development system, including business office professionals, based on individual staff or district needs	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
2.4- I regularly engage in learning to enhance performance through high-quality professional development aligned with district goals and professional standards	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
2.5- I stay innovative and informed of leading-edge practices to drive continuous improvement and adapt to evolving educational and operational needs	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

Standard Category 3: Sustainable Operations

3.1- I implement safety measures and strategies to protect students, staff, visitors, and facilities	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
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3.2- I lead the process of long-range planning for capital projects to achieve financial, operational, and learning benchmarks	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.3- I create and execute a long-range asset management plan to budget for maintenance, equipment replacement, and technology upgrades, ensuring proper stewardship of capital assets	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.4- I develop and maintain a legally compliant records management system	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.5- I proactively create data protection protocols to ensure the privacy and security of records are maintained	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.6- I interpret and apply local policies to ensure operational excellence that supports education	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.7- I develop and administer the district's crisis response plan in collaboration with others	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.8- I ensure equitable community access to school facilities while maintaining safety, responsible use of district assets, and compliance with district policy	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.9- I ensure food service and transportation programs adhere to legal requirements and support student readiness for learning	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
3.10- I collaborate with stakeholders to operate environmentally clean, sustainable schools	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

Standard Category 4: Communication

4.1- I collaborate with stakeholders to ensure open, frequent, and transparent two-way communication	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
4.2- I communicate the school district's budget and financial outlook in a way that ensures each stakeholder understands the data most relevant to their needs	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
4.3- I interpret and communicate data and information to support and guide decision-makers across the school community and government	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
4.4- I communicate accurate and timely school referenda information to stakeholders	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

Standard Category 5: Leadership

5.1- I follow ethical guidelines and promote integrity across all operations within the school district	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.2- I understand the context of public education in the United States and Wisconsin, including its history, policies, and challenges, to effectively lead within the public sector	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.3- I identify and apply best practices in leadership to support continuous improvement	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.4- Effectively supervise and evaluate professional staff fostering a culture of continuous learning, high expectations, and shared responsibility for student success	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.5- I empower others to make decisions that support education	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.6- I use leadership strategies to work effectively in diverse teams, fostering inclusion, respect, and open communication	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.7- I understand and apply state and federal laws and regulations to protect individual rights within the Wisconsin K-12 public education system	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.8- I develop skills of staff members as leaders to prepare them as future leaders within the school community	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always
5.9- I engage in non-partisan advocacy for adequate and equitable public school funding	0 N/A	1 Never	2 Rarely	3 Sometimes	4 Frequently	5 Always

Review all of your self-reflection scores in each category. For each category, list the number of the standard(s) that you scored yourself a 0, 1, 2, or 3. Then identify the top three standards that you would like to continue your professional learning in.

Category 1: Financial management: _____

Category 2: Improvement: _____

Category 3: Sustainable operations: _____

Category 4: Communication: _____

Category 5: Leadership: _____

The top 3 standards I want to improve are: _____

Resources

- **The Art of Coaching: Effective Strategies for School Transformation**
 - Author: Elena Aguilar
 - Focus: Practical coaching strategies for school transformation.
- **The Art of Coaching Teams: Building Resilient Communities That Transform Schools**
 - Author: Elena Aguilar
 - Focus: Coaching school teams for success and collaboration
- **The Impact Cycle: Identify, Learn, Improve**
 - Author: Jim Knight
 - Focus: A structured cycle for instructional coaching.
- **Coaching Matters**
 - Authors: Joellen Killion, Cindy Harrison, Chris Bryan, Heather Clifton
 - Focus: The impact of coaching in education and its implementation.