Adopted: 3/1/99

NAME:

TITLE: Business Manager/Board Secretary

- **QUALIFICATIONS:** 1. High School Diploma
 - 2. Knowledge of accounting systems and procedures.
 - 3. Skill in using spreadsheet, database and other software.
 - 4. Ability to accurately input data into a computer.
 - 5. Ability to communicate clearly and accurately.
 - Ability concerning confidentiality of information and professionalism regarding sensitive matters.
 - Certificate of good health.
 - Such alternatives to the above qualifications as the Board may find appropriate and acceptable.

REPORTS TO:

Superintendent

JOB GOAL:

To develop, coordinate, control, and direct all business, accounting and record keeping practices and procedures necessary for the accurate, efficient reporting and management of District fiscal transactions, and to ensure that District assets and resources are utilized in the manner which maximizes the educational opportunities and services for each student.

TERMS OF EMPLOYMENT: Twelve-month year. Salary and work year to be established by the Board.

EVALUATION:

Performance of this job will be evaluated in accordance with provisions of the Board's policy on Evaluation of Support Personnel.

PERFORMANCE RESPONSIBILITIES:

| Meets <u>Expectations</u> | Needs <u>Emphasis</u> | | |
|------------------------------|--------------------------|----|---|
| | | 1. | Supervises business and financial management of the District under the general direction of the Superintendent and complies with Board policies and objectives. Operates the various financial accounting packages. |
| | | 2. | Supervises personnel involved in business services, financial procedures, purchasing and allied operations, to provide leadership and guidance in carrying out their assigned responsibilities. |
| | | 3. | Supervises preparation of budget forms, directs development of the budget and provides effective functional budgetary controls to ensure maximum support of approved programs and services within available resources. |
| | | 4. | Posts ensuing year's budget amounts required for the general and schoolhouse funds, certified to the County Auditor, Department of Education and the State Controller. |
| | | 5. | Directs procedures of the accounting department, being responsible for the receipt and recording of all revenues by appropriate fund, the preparation of payrolls and all such financial operations to provide sound fiscal management. |
| | | 6. | Records deposits in receipt books, enters in computer and takes deposits to bank. |
| | | 7. | Deposits all miscellaneous revenue collected and renders a monthly report to the Board of the receipts during the preceding month. |
| | | 8. | Reconciles all bank accounts maintained by the Board. |

| Meets Expectations | Needs <u>Emphasis</u> | |
|-----------------------|--------------------------|--|
| | | Traces errors and records adjustment to correct charges or credits posted to incorrect amounts. |
| | | Assists administration in the projection of revenue and expenditures and management of the district's investment portfolio. |
| | | 11. Prepares financial statements, income statements, and cost reports to reflect financial condition of the district's funds. |
| | | 12. Files monthly a complete statement of all receipts and disbursements from the various fundand the balance remaining on hand. This monthly statement shall be open to public inspection. |
| | | 13. Administers the District's insurance programs, both business and group benefit coverage, takes steps and makes recommendations which provide maximum security against loss, for the greatest economy of premium. |
| | | 14. Maintains a complete and systematic set of records of all payroll and insurance related financial transactions of the district. |
| | | 15. Assumes responsibility for personnel insurance records and insurance accounting. |
| | | 16. Prepares payrolls, including deductions for withholding tax, pension, social security, medical insurance, dental insurance, tax sheltered annuities, and such other required salary deductions. |
| | | 17. Prepares and maintains all necessary earnings records, deduction records, and similar personnel payment records IPERS, 941's, etc. |
| | | 18. Develops procedures and supervises internal audits and assists with the annual audits of District funds, to ensure the responsible, accurate and efficient management of the District's finances. |
| | | 19. Makes a full and complete itemized report of the finances of the district to the Board at the close of each school year. |
| | | 20. Maintains and operates the financial accounting software. |
| | | 21. Reports to the superintendent on the accounting affairs of the district and recommends changes and improvements as needed. |
| | | 22. Performs such other tasks and assumes such other responsibilities that may from time to time be assigned by the superintendent. |
| | | Attendance |
| | | Punctuality |
| | | Dependability |
| | | Relationship with Other Personnel |
| | | Relationship with Students/Public |
| | | Quality of Work |

| Meets <u>Expectations</u> | Needs <u>Emphasis</u> | |
|---------------------------|--------------------------|--|
| | | Cooperation |
| | | Work Habits (Neatness, Speed, Etc.) |
| | | School Ethics (Confidentiality, Loyalty) |
| | | Other |
| EVALUATIO | ON SUMMAR | Y |
| I believe that the | his employee's | major strong points are: |
| 1 | | |
| | | |
| 2 | | |
| | | |
| 3 | | |
| | | |
| | _ | reas need improvement: |
| 1 | | |
| 2 | | |
| | | |
| 3 | | |
| | | |

| I have read this evaluation and have had a conference with the evaluator | Yes | No | |
|--|---------|----|------|
| I agree with the evaluator. | Yes | No | |
| If no, with what specific statement(s) do you disagree? | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Signature of Evaluator | Date: _ | | |
| Signature of Employee: | Date: _ | | |
| | | | |

file:n:\data\payroll