

# **A SCHOOL BOARD & SUPERINTENDENT'S GUIDE**

for School Business Official Recruitment,  
Employment, Development, and Retention



**MONTANA  
ASSOCIATION OF SCHOOL BUSINESS OFFICIALS  
(MASBO)**

# TAP INTO THE INVALUABLE KNOWLEDGE OF SCHOOL BUSINESS OFFICIALS

The role of School Business Officials (SBOs) has evolved significantly beyond the traditional concept of the Montana “school clerk.” Today, SBOs are dynamic leaders with expertise extending far beyond school budgets. They are indispensable members of your administrative team, whose knowledge and skills ensure stability for both staff and students within your district.

This resource aims to provide School Boards and Superintendents with a comprehensive guide to fostering a successful and enduring relationship with your SBO. It emphasizes the importance of recognizing the SBO position as a key leadership role within Montana districts. The process includes defining the role, recruiting, selecting, and supporting the professional growth of the SBO. Talented, knowledgeable, and multifaceted directors are essential for efficient school operations and the responsible use of taxpayer dollars.

Whether you are considering a new hire, expanding your financial team for continuity, or developing a transition plan, we hope this guide will assist you and your district. At MASBO, our mission —“Empowering School Business Leaders Through Education”—is one we take seriously. We encourage you to ask questions, attend MASBO training, and support ongoing professional development for yourself and your entire administrative team.

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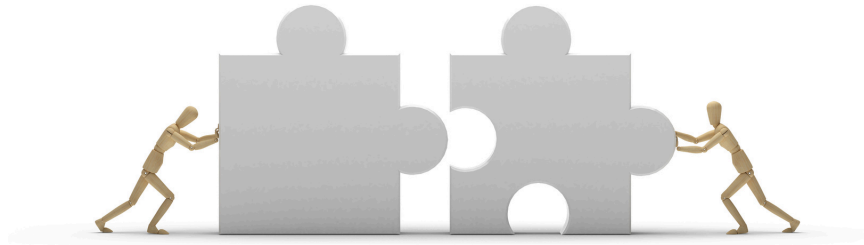


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# MAKING THE RIGHT CHOICE FOR YOUR DISTRICT



## Six Steps to Selecting and Hiring a School Business Official

### 1. Determine the Role of Your SBO

Your first step to obtaining a new School Business Official is to know the duties and responsibilities of this position. We provide your administrative team a comprehensive list of tasks and skills required and the legal requirements that each District must meet.

### 2. Determine Title, Qualifications and Salary Range

Once you understand the tasks this individual performs, consider if the job title and salary are realistic in relation to other positions within the district. What are the hours required to complete all the tasks; including allotments for professional development, leave usage and unexpected emergencies? What qualifications you are seeking? You may find this position's tasks have grown unreasonable for one person to accomplish.

### 3. Create a Job Description & Position Announcement

Review your existing descriptions to ensure they encompass all that you listed on the Tasks and Skills Checklist. We have provided you with several sample job descriptions for your use that are currently utilized in the field.

### 4. Recruitment of Candidates

If you are planning on advertising the position externally, feel free to send your job description to MASBO to be posted on our website. You may also post it on the OPI job site under "other administrative positions".

### 5. Interviewing and Selection

Ensure that the candidate understands the hiring practices of the district and the duties of the position including after hours, emergency work, committee requirements, supervisory duties, etc.

### 6. Commit to Professional Growth

Montana ASBO provides an array of resources and opportunities to assist your newly selected SBO so that they are successful and feel supported in their new role.

# STEP ONE: DETERMINE THE ROLE OF YOUR SBO

Montana roles of the SBO vary greatly across the state. Many believe that the title District Clerk is synonymous with the School Business Official or School Business Manager, and in many cases, it's true. Other districts separate these positions. Titles vary across the state. It's crucial for School Superintendents and School Boards to understand the legal differences and obligations of each role.

## **Legal Requirement for District Clerk vs. School Business Official**

### **District Clerk (MCA 20-3-325):**

Legal Requirements: Under Montana Code Annotated (MCA) 20-3-325, each school district in Montana is legally required to employ a District Clerk.

The primary responsibilities of the District Clerk include:

- Attending all meetings of the trustees to keep an accurate and permanent record of all proceedings.
- Keeping an accurate and detailed accounting of all receipts and expenditures.
- Preparing and submitting reports as required by the board of trustees or the state superintendent of public instruction.
- Issuing and signing warrants for the payment of district expenditures.

The District Clerk plays a crucial role in ensuring compliance with state laws regarding the financial and administrative operations of the school district. The District Clerk is the custodian of all documents, records, and reports of the trustees.

### **School Business Official Role and Responsibilities:**

While the District Clerk position is legally mandated, the role of the School Business Official (SBO) encompasses a broader range of responsibilities related to the management of school business matters. This may include any of the following and should be considered prior to developing a comprehensive recruitment document, position description, and subsequent evaluation tools. A more detailed list of job duties is available in a later portion of this document.

The SBO position typically includes tasks such as:

- Financial planning and budgeting
- Oversight of accounting and finance systems
- Management of debt services and capital funds
- Conducting audits and implementing fiscal controls
- Procurement and supply chain management
- Planning and managing school facilities and construction projects
- Handling insurance and risk management
- Reporting and compliance with state and federal regulations
- Managing cash flow and investments
- Supervising transportation and food services
- Developing policies and managing personnel



The School Business Official's role is more comprehensive, extending beyond the duties of the District Clerk to include strategic financial management and operational oversight.

### **One Additional Role - Election Administrator Responsibilities:**

In Montana, the School Business Official (SBO) serves as the school election administrator, a role critical to ensuring the integrity and smooth operation of school district elections. The SBO's duties as an election administrator are specifically outlined in 13-1-101, 14 (a)(b), MCA, and include coordinating all aspects of the election process, from planning and preparing election timelines to ensuring compliance with state election laws. This requires coordination between the state and local election authorities.

Specific responsibilities involve:

- Preparing and distributing ballots
- Publicizing election notices
- Recruiting and training election judges
- Accurately tabulating and certifying election results
- Resolving any disputes or issues that arise
- Maintaining meticulous records of all election-related activities



By fulfilling these duties, the SBO helps to uphold the democratic process within the school district, ensuring that all eligible voters have the opportunity to participate in decisions affecting local education.

## **Combining the Roles**

Common Practice in Montana Schools: In many Montana school districts, the roles of the District Clerk and the School Business Official are combined into a single position. This practice is often adopted to streamline administrative processes, enhance efficiency, and ensure a cohesive approach to managing the school district's financial and business operations. Combining these roles is particularly common in smaller school districts where resources and staffing are more limited. It allows for better resource utilization and ensures that the district can maintain compliance with legal requirements while also effectively managing all business-related functions.

Given the increasing demands of financial and operational management, it is important to evaluate whether one individual can reasonably and effectively fulfill this role. Additionally, it is crucial to establish safeguards to ensure that the responsibilities of the School Business Official (SBO) are maintained during any absences or if the position becomes vacant.

## **The District Clerk/SBO Task & Skills Checklist**

In collaboration with the Superintendent and Board of Trustees, School Business Officials (SBOs) are ultimately accountable to the community, ensuring that every dollar invested in the district is well spent and supports the educational development of every student. Regardless of the size of the school or district, SBOs must gain experience and demonstrate expertise in a wide range of areas. We encourage the School Board and Superintendent to review the following list to outline the expectations and qualifications necessary to meet the needs of your district. We have provided additional spaces for each district to include individual tasks they may need to include in a subsequent job description.



## FUNCTIONS

DISTRICT CLERK TASKS & SKILLS	Perform Specific Tasks (i.e., payroll)	Direct, Oversee &/or Supervise	Key Decision Maker &/or Evaluator
<b>Board &amp; District Policies</b>			
Evaluate & Advise on Financial, Business & Budgetary Policies			
Maintain & Monitor All School Board Policies & Procedures			
Recommend Communication Policies for the Public & Press/ Media			
<b>Board Meetings &amp; Public Relations</b>			
Assist in the Scheduling & Notice of all Public Meetings			
Assist in the Development & Distribution of the Board Agendas			
Assist in Trustee Orientation & Training			
Assist Trustees in Interpreting, Presenting & Planning School Financial Programs			
Provide Appropriate Data for Meetings (including financial records)			
Retain Meeting Documents in Accordance with the State Records Retention Schedule			
Inform staff & public of board procedures			
Prepare & Submit TFS on Behalf of the Board to the OPI			
Prepare & Release Information to the Public & Press			

<b>ELECTION ADMINISTRATOR TASKS &amp; SKILLS</b>	<b>Perform Specific Tasks (i.e., payroll)</b>	<b>Direct, Oversee and/or Supervise</b>	<b>Key Decision Maker and/or Evaluator</b>
<b>Elections</b>			
Serve as the Election Administrator & Appoint Assistant Election Administrator if necessary			
Ensure the Election is in Compliance with All Election Law X and the ADA			
Schedule meeting for trustees to pass resolution calling for an election			
Create and Provide the Board Relevant Resolutions Required for Trustee, Bond, Levy & Other Elections			
Provide financial information for levy and bond elections			
Post All Election Notices & the Intent to Increase Non-Voted Levy Resolution (Due March 31st)			
Correspond with County & State Election Officials			
Identify, Notify & Train Election Judges			
Provide Supplies for Election			
Oversee Election Ballot Creation, Distribution, & Tally			
Compile information to provide for certification of election returns			
Maintain the OPI Board of Trustees Repository			
Maintain All Election Records in Accordance with the State Records Retention Schedule			

<b>SCHOOL BUSINESS OFFICIAL TASKS &amp; SKILLS</b>	<b>Perform Specific Tasks (i.e., payroll)</b>	<b>Direct, Oversee and/or Supervise</b>	<b>Key Decision Maker and/or Evaluator</b>
<b>Financial Planning, Budgeting &amp; Account Management</b>			
Understand Governmental Accounting			
Prepare Budgets & Maintain Reporting for All Funds- Including Debt Services & Capital Funds			
Accounting & Finance Systems Management			
Accounts Payable & Receivable Management			
Maintain Relations with Financial Institutions Including Deposits, Signers, & Reconciliations			
Reconcile with County Treasurer & Report Deposits, Claims & Payroll Expenses Monthly			
Print & Sign All Warrants for District Expenditures & Student Activities Checks			
Maintain Accurate Enrollment & Other OPI AIM Records Related to the Budget			
Audit Scheduling, Preparation & Response			
Grant Applications & Management Including Impact Aid			
Title & Special Education Funding Compliance			
Purchasing & Supply Management			
Implementation of Fiscal Controls & Continual Monitoring of the Budget			
Understanding of RFP & Bid Law			
Maintain All Financial Permanent Records in Accordance with the State Records Retention Schedule			

SCHOOL BUSINESS OFFICIAL TASKS & SKILLS	Perform Specific Tasks (i.e., payroll)	Direct, Oversee and/or Supervise	Key Decision Maker and/or Evaluator
<b>Payroll &amp; Human Resource Management</b>			
Payroll & Timecard Management & Reporting			
Maintain Employee Certification, Payroll & Paid Time Off Records in Accordance with the State Records Retention Schedule			
Workman’s Comp, Unemployment & Local Benefits Management/ Administration			
Title IX, FLMA, ADA & Other Employer Coordination & Training			
Business Office Personnel Training, Management & Evaluations			
Posting of Available Positions & Job Description Management			
Collective Bargaining & Negotiations			
TEAMS/TOE AIM Reporting			
<b>Negotiations</b>			
Serve on Management Team & Share Appropriate Information to Aid in Negotiations			
Record & Maintain Minutes of Negotiation Session when Necessary			
<b>Technology &amp; Systems</b>			
Recommend Systems & Programs for Business Functions			
Operate all Accounting, Payroll, Timecard, Inventory Systems			



<b>SCHOOL BUSINESS OFFICIAL TASKS &amp; SKILLS</b>	<b>Perform Specific Tasks (i.e., payroll)</b>	<b>Direct, Oversee and/or Supervise</b>	<b>Key Decision Maker and/or Evaluator</b>
<b>Operation &amp; Maintenance of School Facilities &amp; Facility Use Management</b>			
Responsible for School Facility Planning, Construction & Operations			
Maintain the School Facilities, Rental Properties & Grounds & Recommend Repairs & Replacements			
Emergency Planning & Operations & Insurance/Risk Management			
Serve on the Safety Committee & Manage Campus Security & Safety Inspections			
Coordinate Department of Labor Inspections			
Inventory & Asset Management- Including Maintain Capital Assets Tracking			
Maintain a Professional Working Relationship with Vendors			
Maintain Records of Use of School Facilities by Outside Organizations			
Recommend & Manage Disposal of Obsolete Equipment			
Manage & Train Maintenance/ Custodial Personnel			
Maintain records of leases, rights-of-way and easements			
Manage rental & Use of school owned facilities, gyms, classrooms, etc.			

SCHOOL BUSINESS OFFICIAL TASKS & SKILLS	Perform Specific Tasks (i.e., payroll)	Direct, Oversee and/or Supervise	Key Decision Maker and/or Evaluator
<b>Risk Management</b>			
Determine Insurable Values, Maintain a Register of Buildings & Assets & File Necessary Claims			
Recommend Policies for Casualty, Liability, Fidelity and School Indemnity			
Manage Property & Liability Insurance Accounts, Claims, Records & Reports			
Play a Key Role on the Safety Committee & the Emergency Chain of Command			
Communicate with the Public in Regards to the Use of School Facilities & Insurance Limitaitons			
<b>Food Service Management</b>			
Recommend Policies & Procedures			
Maintain & Manage Food Service Records in Accordance with the State Records Retention Schedule			
Manage the Selling of Lunches, Fund Collections, Cost Analysis & the Purchase of Supplies & Equipment			
File State & Federal Reports & Claims			
<b>Student Data</b>			
Maintain Student Permanent Records & the Register of Pupil Attendance			
Complete Enrollment Reports			

SCHOOL BUSINESS OFFICIAL TASKS & SKILLS	Perform Specific Tasks (i.e., payroll)	Direct, Oversee and/or Supervise	Key Decision Maker and/or Evaluator
<b>Pupil Transportation Management</b>			
Recommend Policies & Procedures			
Maintain Bus Drivers, Bus Maintenance, Bus Routes & Schedules, Bus Inspections & Training			
Maintain Transportation Contracts, File State Reports & Claims, Develop Routes & Schedules			
<b>Office Management</b>			
Front Office Management			
Student Activity Funds			
Substitute & Call Out Help			
Staff Development & Training			
<b>Other Administration</b>			
Maintain Storage Files, Recommend Disposal of Records & Comply with Disposal Laws			
Legislative Monitoring			
Cash Management & Debt Service- Manage Bonds, Investments, Debt Service Payments, Maintain Petty Cash & Receipts			
Purchasing & Supply Management- Call for Bids, Develop Specifications, Maintain Inventory & Fixed Asset Records, Distribute General Supplies			

After the district has secured a School Business Official (SBO) or business office team, we recommend utilizing this tool annually to ensure that all duties and daily operations of the District Business Office are thoroughly documented. A SBO & Superintendent Duties List with greater detail can be found on the [resource page](#) of the MASBO website. We advise assigning additional staff and/or resources to tasks that may require such. These tasks may be traditionally allocated to other individuals including the Superintendent or the front office staff. Establishing a strong administrative team allows the SBO, Superintendent, and Board of Trustees to focus on their respective areas of responsibility and expertise. This collaboration ensures that the district's financial resources are effectively managed, enabling the Board and Superintendent to concentrate on strategic planning, community support, student engagement, educational goals, and overall district improvement.

Having a knowledgeable leader in the Business Office is crucial for ensuring compliance with financial management and reporting requirements. An experienced SBO helps the Board understand complex financial legalities and assess the long-term implications of their decisions. Through continued professional development, the SBO can propose greater efficiencies, assist in seizing opportunities, and brainstorm creative solutions to challenges. This promotes transparency and accountability to stakeholders. A well-rounded approach to district management will ultimately enhance the overall effectiveness and efficiency of your educational system.

**BOTTOM LINE:  
THE WIDE-RANGING EXPERTISE A  
SCHOOL BUSINESS OFFICIAL BRINGS IS  
INDISPENSABLE TO THE DISTRICT.**



## STEP 2: DETERMINE TITLE, QUALIFICATIONS, & SALARY RANGE

### WHAT TITLE SHOULD I CHOOSE FOR MY SCHOOL BUSINESS OFFICIAL?

Below is a set of typical titles and qualifications of SBOs based on their scope of responsibilities. Refer to the School Business Official Task and Function Checklist to understand what responsibilities you would like your school business official to perform. For example, if you checked “Key Decision Maker and/or Evaluator” and/or “Directs, Oversees and/or Supervises” for a wide scope of functions, consider a title that reflects this.

Typical Titles	Scope of Responsibilities	Typical Qualifications
Chief Financial Officer or Director of Business/Finance	Oversees, supervises and/or is a key decision maker for all finance and operational aspects of a school district.	<ul style="list-style-type: none"> <li>• Five or more years of experience</li> <li>• Bachelor’s degree in business, accounting, or other related experience.</li> <li>• CPA</li> <li>• MCSBO certification through MASBO and/or SFO through ASBO International.</li> </ul>
Business Manager or Business Official	Oversees &/or supervises some or all financial & operational aspects of a school district.	<ul style="list-style-type: none"> <li>• Bachelor’s or associate degree encouraged.</li> <li>• Experience in Governmental Accounting.</li> <li>• MCSBO certification through MASBO encouraged</li> </ul>
Payroll, Human Resources, Accounting, Transportation, Student Activities, Facilities, Food Services, IT, or in field of position applied for.	Oversees specific areas within the Business Office and relates this knowledge to a supervisor or the Superintendent. Cross trains as needed.	<ul style="list-style-type: none"> <li>• Specific knowledge and work experience of the area of expertise.</li> </ul>

*Please note that titles and scope of responsibilities vary significantly from district to district. This is not intended for the purposes of reclassifying current school business professionals.*

## **WHAT QUALIFICATIONS SHOULD WE REQUIRE OF OUR SBO?**

By establishing clear prequalification's, Districts can attract and identify the best candidates who will contribute to the fiscal stability and overall success of the district. Below is a detailed list of the recommended prequalification's for an SBO/District Clerk position in Montana.

### **1. Educational Background:**

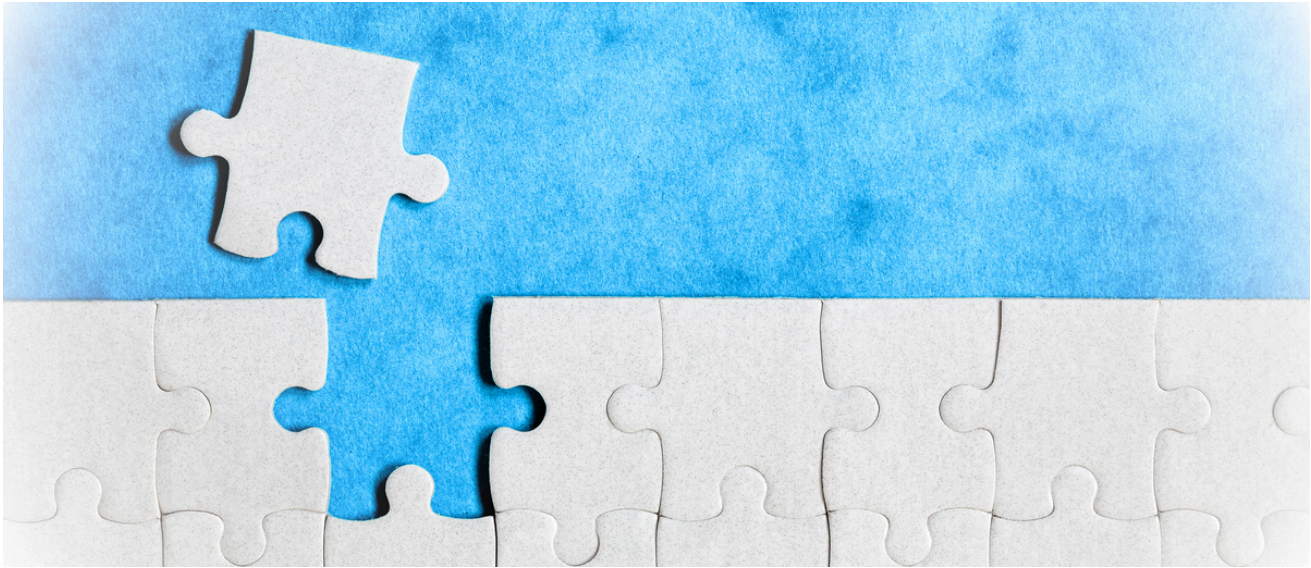
- Any combination of training and/or experience that could likely provide the desired knowledge and abilities required.
- A bachelor's degree in accounting, finance, business administration, or a related field is preferred.
- Certification as a Certified Public Accountant (CPA) or School Business Official (SBO) is highly desirable.

### **2. Experience:**

- A minimum of three years of experience in government finance, financial management, accounting, business administration, or related fields.
- Previous experience working in a public school district, educational institution, or other governmental system is preferred.
- Proven track record of managing budgets, financial reporting, and operational audits.

### **3. Knowledge and Skills:**

- Understanding of Montana school finance laws and regulations.
- Proficiency in accounting software and financial management systems.
- Strong analytical and problem-solving skills.
- Excellent communication and interpersonal skills.
- Ability to prepare and present complex financial data to various stakeholders.



#### **4. Leadership and Management:**

- Demonstrated ability to lead and manage a team effectively.
- Experience in strategic planning and organizational development.
- Ability to collaborate with the Superintendent, Board of Trustees, and other district leaders to achieve district goals.

#### **5. Certifications and Licenses:**

- Valid Montana Driver's License.
- Bonding as required by state law.

#### **6. Professional Development:**

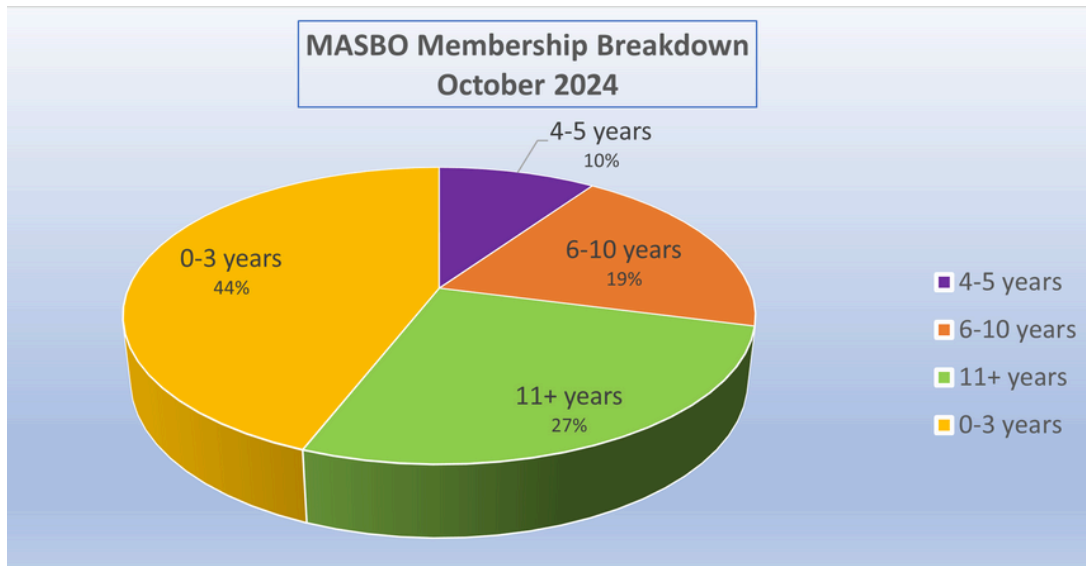
- Commitment to continuous professional development and staying current with changes in school finance and educational laws.
- Active participation in professional organizations such as MASBO (Montana Association of School Business Officials).

#### **7. Other Requirements:**

- Strong ethical standards and integrity.
- Ability to work evenings as necessary.
- Willingness to undergo a background check
- Provide professional references.

## IS THREE YEARS' EXPERIENCE REALLY ALL YOU RECOMMEND?

The pool of School Business Officials (SBOs) in Montana encompasses a wide range of experience levels. However, the state is currently facing a significant challenge due to an influx of retirements and high turnover rates among these professionals. This trend has heightened the need for focused efforts on recruitment and retention strategies.



As experienced SBOs retire, it becomes increasingly critical to attract and develop new talent to ensure the continued effective management of school districts' financial and operational responsibilities. Consequently, school districts must prioritize creating appealing job conditions and providing robust support and professional development opportunities to maintain a strong and capable workforce.

## WHAT SALARY SHOULD THE DISTRICT CONSIDER?

While salaries vary across the state, we encourage Boards and Superintendents to consider the following factors:

- **Comparable Private Sector Positions:** Evaluate what a position in the private sector requiring the same skill sets, knowledge, and experience managing millions of dollars would offer in terms of compensation.

- **Work Schedule:** Consider the expected work schedule, including days and evenings, in comparison to other salaried employees in the district.
- **Benefits:** Assess the benefits offered to administrative staff within the district, such as flexible schedules, additional leave, and other benefits.
- **Cost of Living:** Consider the cost of living within your community.

The following chart depicts the most recent salary survey of school Business Officials across the state provide the following information. For more details and a region-by-region comparison, please go to [www.masbo.com](http://www.masbo.com) and review the Salary Survey under publications.

District Size	State Average Annualized Salary	Salary Range (annualized)
AA	\$ 126,915.79	\$111,000 to \$135,353
A	\$ 80,751.93	\$55,500 to \$115,000
B	\$ 63,637.97	\$41,600 to \$86,869
C	\$ 50,596.70	\$31,400 to \$90,000
Independent Elem	\$ 54,794.93	\$28,000 to \$91,500
Cooperative	\$ 52,230.00	\$30,713 to \$72,000

**Data from February 2024**





## **Exempt vs. Non-Exempt Employees and Salary Level Requirements**

In the context of school business officials (SBOs) in Montana, it is essential to understand the distinction between exempt and non-exempt employees under the Fair Labor Standards Act (FLSA). This classification determines eligibility for overtime pay and is primarily based on job duties and salary. Most SBO's hold exempt contracts. Please reach out to legal counsel to distinguish your positions status.

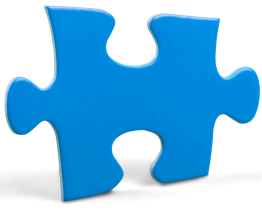
### **Exempt Employees:**

- Definition: Exempt employees are those who are not entitled to overtime pay. They generally hold executive, administrative, or professional roles.
- Salary Requirements: As of November 15th, 2025 the Fair Labor Standards act requires that all exempt employees must be paid a minimum of \$684 per week or \$35,558 annually. The Federal Department of Labor attempted to adjust these amounts in 2024 but their action was struck down in Federal Court.
- Duties Test: To qualify as exempt, an employee's job duties must primarily involve executive, administrative, or professional tasks.

### **Non-Exempt Employees:**

- Definition: Non-exempt employees are entitled to overtime pay at one and a half times their regular rate for any hours worked over 40 in a workweek.

Salary Threshold: Employees earning less than the specified threshold for exempt status must be classified as non-exempt and are eligible for overtime pay.



## Key Considerations for School Districts:

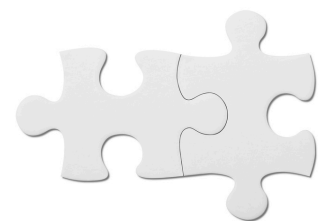
- **Compliance:** Ensure that your district complies with the FLSA by correctly classifying employees based on their job duties and salaries.
- **Compensation Planning:** Review the compensation packages for SBOs and other key administrative roles to ensure they meet or exceed the new wage thresholds to maintain exempt status if applicable.
- **Job Descriptions:** Clearly outline the duties and expectations in job descriptions to align with the exempt classification requirements.

By understanding these distinctions and ensuring compliance with federal regulations, school districts can effectively manage their workforce and avoid potential legal issues related to employee classification and compensation.

## STEP 3: CREATE A JOB DESCRIPTION & POSITION ANNOUNCEMENT

### UTILIZING ALL THE DECISIONS YOU'VE MADE INTO A JOB DESCRIPTION

Creating a comprehensive and realistic job description is essential for setting clear expectations for your School Business Official (SBO) or District Clerk. It ensures that candidates are fully aware of their duties and responsibilities, thereby minimizing surprises and misunderstandings. Incorporate the task list provided earlier in this guide as a reference. This will help you cover all necessary aspects of the role.





When drafting your job description, consider whether it reflects a realistic expectation within your organization. The business office has experienced significant growth in duties and expectations, and it is important to account for this evolution. Trustees and Superintendents should take into account the feedback from prior Business Officials, the retention rate for this position, and the expectations in neighboring school districts. This thorough consideration will help create a job description that not only attracts qualified candidates but also supports their long-term success and satisfaction in the role.

In **Appendix A**, you will find sample job descriptions, position announcements, and sample disclaimer language that can be tailored to fit the specific needs and structure of your district. These samples were provided from the field and serve as a foundation to ensure that all critical areas are addressed, providing clarity and alignment for both the district and its Business Official.

***These samples are not to be construed in any way as legal guidance. Please consult your legal team to ensure your policies, handbooks and postings all align and comply with state and federal laws.***



**A PERSPECTIVE SBO'S  
FIRST IMPRESSION OF  
YOUR DISTRICT IS  
YOUR POSITION  
ANNOUNCEMENT &  
JOB DESCRIPTION**

## **Key Components of the Position Announcement**

Creating a comprehensive and engaging position announcement is essential for attracting qualified candidates for the School Business Official (SBO) role. Here's a detailed guide on what to include:

### **1. Job Title and Overview**

- **Job Title:** Clearly state the position title (e.g., School Business Official/District Clerk).
- **Overview:** Provide a brief summary of the role, highlighting its importance and primary responsibilities. Mention the school's or district's mission and values to give context.

### **2. Key Responsibilities**

- **Financial Management:** Outline responsibilities related to budgeting, financial reporting, audits, and compliance with state and federal regulations.
- **Operations Management:** Include tasks such as managing facilities, transportation, procurement, and human resources.
- **Strategic Planning:** Highlight the role in supporting the Superintendent and Board of Trustees with long-term financial and operational planning.
- **Stakeholder Communication:** Emphasize duties related to communication with parents, staff, and the community regarding financial matters.
- **Duties to the Board:** Will evenings be required to attend Board meeting? Approximately how many meetings are held per month.
- **Election Duties:** Include times when the election administrator may have to work outside of the typical school calendar, development and distribution of ballots, adhering to all applicable election laws and training of election judges.

### **3. Salary and Benefits**

- **Compensation:** Provide information about the salary range.
- **Benefits:** Outline benefits such as health insurance, retirement plans, professional development opportunities, and any other perks.

#### **4. Qualifications**

- Educational Requirements
- Experience
- Skills and Competencies: List necessary skills such as financial analysis, strategic planning, communication, leadership, and proficiency with financial software.

#### **5. Prequalification Criteria**

- Legal Requirements: Mention any specific legal requirements or certifications necessary for the role.
- Knowledge Areas: Highlight key knowledge areas, including school finance law, budgeting processes, and state and federal compliance requirements.

#### **6. Application Process**

- How to Apply: Provide clear instructions on how to apply, including the format for submitting resumes and cover letters.
- Deadline: State the application deadline.
- Contact Information: Include contact details for inquiries and further information.

#### **7. Equal Opportunity Statement and Veteran's Preference**

- Diversity and Inclusion: Include a statement about the district's commitment to diversity and equal opportunity employment. A sample is provided in Appendix A2.
- Veteran's Preference: In Montana, as in many other states, veterans who have served honorably are entitled to certain preferences when applying for positions within public institutions, including school districts. A sample of a veteran's preference statement available in Appendix A2.

#### **8. About the District**

- District Profile: Provide a brief description of the school district, including its size, location, community, and key achievements.
- Mission, Values, and Educational Philosophy.

## STEP 4: RECRUITMENT OF CANDIDATES

### POSTING YOUR POSITION

Once you have decided the role of your school business official and selected your desired qualifications, you have many options to find the best possible candidate for the position.

#### **Option 1: Recruiting and Posting the Position**

First, consider the application process of your district. Is the process overcomplicated, time consuming, confusing, or tedious? The market is extremely competitive. Consider how your process compares to others.

#### **SCHOOL WEBSITE**

Speak with your IT department to ensure the application is easily accessible and clearly outlines the expectations. This medium will provide you candidates who live or work within your immediate area.

#### **MASBO JOB BOARD**

Montana ASBO updates their job listings on a regular basis and is a go-to resource for business officials who are in the job market. MASBO currently enrolls 98% of the schools in Montana and is utilized by school business officials on a regular basis.

#### **ASBO INTERNATIONAL CAREER CENTRAL**

For a broader search of candidates from in-state and out-of-state, consider posting through ASBO International's career site.

#### **MONTANA OFFICE OF PUBLIC INSTRUCTION**

While the title of the website indicates that this job bank is for teachers, you can post administrative positions as well. Most school business officials will be listed under the other administrative heading.

#### **PARTNER ORGANIZATIONS**

MASBO has many partner organizations including the School Administrators of Montana. Consider utilizing these resources as well.

## **TRADITIONAL POSTING LOCATIONS**

Many find success with traditional postings including the local newspaper or radio. Others utilize online recruitment platforms such as “*Indeed*” or “*LinkedIn*”. Government Job Services may be a great place to post. When all else fails, consider contracting with an employment agency.

### **Option Two: “Growing Your Own” School Business Official**

Many districts, especially those in areas where school business officials are less readily available, have successfully adopted a "train their own" approach. This method involves providing on-the-job training to promote dedicated staff members into school business management positions. This strategy not only capitalizes on the loyalty and familiarity of district staff, but also builds a strong internal talent pipeline.

MASBO offers mentorship opportunities and additional training services to support this development. By contracting with MASBO, districts can access tailored mentorship and training programs designed to equip staff with the necessary skills for school business management roles. Visit the fee services page at [www.masbo.com](http://www.masbo.com) for more information.

### **Internal Hiring Disclaimer**

When considering internal candidates for a position, it is important to conduct a competitive hiring process to avoid potential claims of discrimination. The Montana Code of Governmental Fair Practices under Title 49 (49-3-207, MCA) mandates that all hiring practices be free from discrimination based on race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, and national origin.

While promoting from within can be beneficial, bypassing a competitive hiring process may increase the risk of perceived or actual favoritism and discrimination claims. Ensuring an open and competitive process helps maintain fairness, transparency, and compliance with legal standards. This approach not only minimizes legal risks but also supports the principles of equal opportunity and merit-based selection.

Please consult with legal counsel to ensure compliance.

## STEP 5: INTERVIEW & SELECTION

Districts across Montana evaluate perspective employees in a variety of ways. Some utilize a hiring committee made up of Trustees, administrators, certified and classified staff. In other districts, the candidates are interviewed solely by the Board. Whichever system you choose, BE CONSISTENT.

Your interview team should take the following steps to ensure an equitable hiring process.

- Someone with HR experience should redact any personally identifiable information from the applicant's packets to reduce bias in the recruitment process. This may include, but is not limited to, gender, age, address, photos, or links to personal webpages.
- The interview committee should each review the applicants and score them from most qualified to least. Select three to four applicants to interview.
- The Interview committee should create a set of interview questions that will be used for each applicant. Interview questions should be asked in the same order and manner for each applicant.

### **See Appendix B for Sample Interview Questions.**

- Schedule the interview time that will work for all committee members and applicants alike, allowing enough time for discussion within the committee.
- **Conducting the Interviews**
- Provide a brief introduction of the committee and an overview of the interview process.
- Allow candidates to present their qualifications and experiences.
- Ask the pre-prepared questions, retain any notes taken.
- Provide time for candidates to ask questions.

- Consider using a scoring rubric to assess each candidate's responses. Discuss the evaluations as a committee and identify top candidates. Please note: When using a scoring rubric, additional points must be allocated for Veterans' Preference.

### **Background and Reference Checks**

- Conduct a comprehensive criminal background check to ensure the candidate has no disqualifying criminal history.
- Contact the candidate's previous employers and supervisors to verify employment history and performance.
  - Use a standardized set of questions for consistency, focusing on reliability, skills, & work ethic.

### **Montana's Open Meeting Law- School Interview Process Best Practices**

Montana's open meeting laws, codified under the Montana Code Annotated (MCA) Title 2, Chapter 3, ensure transparency and public participation in the governmental decision-making process. These laws require that meetings be open to the public, with exceptions only for specific circumstances such as personnel issues, legal strategy, or individual privacy.

### **Relation to the School Interview Process**

When a school district is interviewing candidates for positions, including school business officials (SBOs), the open meeting laws apply.

- **Public Notification:** The District should provide adequate public notice of meetings where interviews or hiring decisions will take place. This ensures the community is aware and can participate or observe as appropriate.
- **Closed Sessions:** While most of the board's meetings must be open to the public, there are provisions for executive (closed) sessions per 2-3-203, MCA. This is limited. See next page for continued explanation.



- **Closed Sessions (continued):** If the candidate wishes to disclose information and that board/interview committee determines that the demands of individual privacy clearly exceed the merits of public disclosure, this portion of the meeting may move into closed session. An example would be if the candidate wished to share information they believe may be included within their background check. The right of individual privacy may be waived by the individual about whom the discussion pertains and, in that event, the meeting must be open.

Please consult legal counsel when handling these situations.

MASBO would suggest that Districts seek information through MTSBA in relation to this process. MTSBA provides detailed examples, explanations, and sample notifications and language to be utilized.

**Transparency and Accountability:** The open meeting laws promote transparency in the hiring process, helping to build public trust. The community can see that hiring practices are fair and unbiased, and that decisions are made in the best interest of the school district.

**Documentation:** Minutes of the open sessions, including the decisions made, must be recorded and made available to the public. This documentation ensures accountability and provides a record of the board's activities and decisions.



By adhering to Montana's open meeting laws, school boards ensure that their interview and hiring processes are transparent, fair, and in compliance with state regulations. This not only protects the board from legal challenges but also reinforces the the integrity and trust of the community in the district's governance.

## Offering the Position

After completing interviews and checks, the committee should meet to discuss findings. The committee or Superintendent will make a Recommendation to the Board. Ensure that the candidate understands the employment process and understand that their name will be discussed in a public board meeting (see open meeting best practices on the prior page). ***Only the Board of Trustees has the ability to make an offer of employment.***

## Nepotism

In Montana, nepotism laws are designed to prevent conflicts of interest and ensure fair hiring practices within public institutions, including school boards. According to 2-2-302, MCA, school board members, are prohibited from participating in the hiring process if a candidate is related by consanguinity within the fourth degree or by affinity within the second degree. Please contact legal counsel, or MTSBA.

## Contracts

While there is no legal impediment to issuing multi-year contracts for a School Business Official (SBO), the District Clerk component of the position must be appointed by the Board annually at the reorganization meeting. Consequently, most SBOs are offered annual contracts.

Contracts should include clear start and end dates, outline the leave accrual rates, salary or hourly rate, details of any benefits package, and the number of contracted days. Initial contract offers should allow for negotiations between both parties.

The job description should be reviewed and attached to the new contract annually. MASBO strongly encourages districts and SBOs to review contract terms with legal counsel to ensure legal compliance, mutual understanding, and comfort with the terms. **Sample contracts are available on the MT School Board Association website .**

## STEP 6: COMMITMENT TO PROFESSIONAL GROWTH

Becoming a competent School Business Official (SBO) requires substantial experience, typically between 3 to 5 years, due to the unique and multifaceted nature of the role. Given the broad range of responsibilities, it is crucial for school districts to invest in the professional development of SBOs. This includes providing ongoing training, mentorship, evaluations, and support. It is important to recognize that a new hire, unless previously employed by a school district, will not have all the necessary experience from the outset.

Moreover, districts that have experienced significant turnover may need additional time to achieve stability and efficiency in their business operations. It can take months to untangle prior financial reports while also completing daily tasks.

This guide focuses on the full career of an SBO, including professional development, mentorship, cross training, evaluative processes, and career opportunities in the future when the SBO transitions into a successful veteran of school finance.

### **Professional Development**

- Adequately budget for travel and professional development opportunities.
- MASBO, ASBO, MTSBA, MREA, OPI, and related organizations including liability insurance, worker's compensation, and payroll organizations all provide training throughout the year.
- If the training is a webinar, consider allowing the SBO the ability to attend somewhere other than the business office to avoid interruptions.

## **Mentorship**

MASBO provides a voluntary, free, mentorship program for all new SBO's (0-5 years experience). Please encourage your new SBO to enroll in the [MASBO mentorship program](#). We make every attempt to provide a mentor who works within a similar sized district, with the same financial software, and if possible, in a similar geographical area. We also encourage SBO's from across the state to meet monthly within their county or other geographical area to share information and experiences.

## **Cross training**

Cross-training ensures that multiple employees can perform essential tasks, reducing dependency on any single individual and enhancing overall operational resilience. It promotes employee development by expanding their skill sets and increasing their understanding of the organization. Cross-trained employees can be more easily redeployed to different roles as needed, providing greater flexibility in workforce management. It fosters a culture of teamwork and collaboration, as employees gain a deeper appreciation for the roles and responsibilities of their colleagues.

By implementing these strategies, organizations can effectively cross-train their employees, resulting in a more versatile and resilient workforce.

### **1. Identify Key Roles and Tasks**

- Focus on roles that are essential for business continuity and have high turnover rates or are prone to bottlenecks.

### **2. Develop a Structured Plan**

- Create a detailed cross-training schedule that outlines when and how training will occur. This should include timelines, milestones, and the specific skills to be learned.
- Develop comprehensive documentation for each role, including job descriptions, standard operating procedures (SOPs), a safe system for password sharing, and key contacts.

### 3. Implement Job Rotation

- Allow employees to rotate through different roles on a regular basis. This helps them gain hands-on experience and a better understanding of various functions within the organization.
- Implement job shadowing programs where employees observe and learn from colleagues performing different tasks.

### 4. Provide Formal Training and Resources

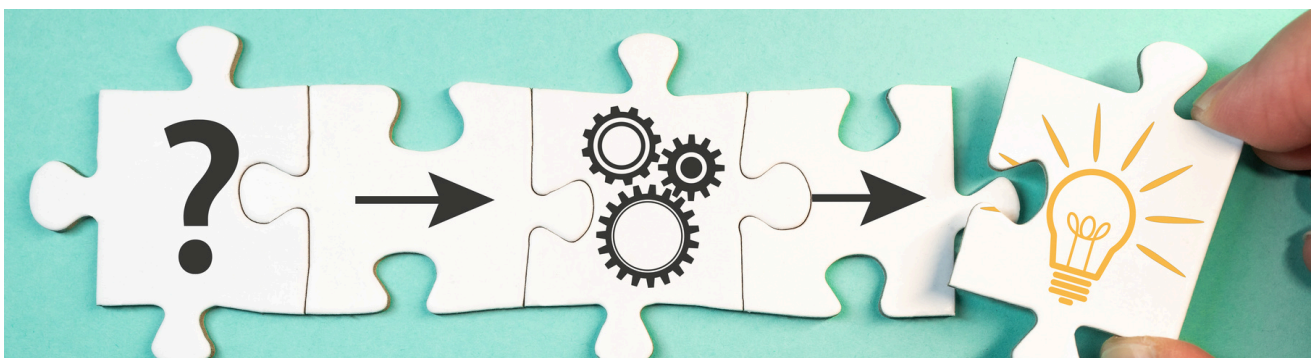
- Include additional staff to attend workshops, seminars, and training sessions focused on developing specific skills required for various roles.

### 5. Encourage Knowledge Sharing

- Create an internal knowledge base or resource library where employees can access information, training materials, and best practices.

### 6. Evaluate, Adjust, and Reward

- Collect feedback from employees about the cross-training process to identify areas for improvement.
- Regularly assess the performance and proficiency of employees in their new roles to ensure the effectiveness of the cross-training program.
- Lastly, recognize and reward employees who successfully complete cross-training programs and demonstrate proficiency in multiple roles.



## Annual Evaluations

Annual evaluations are a vital tool for managing employee performance, fostering professional development, and aligning individual goals with organizational objectives. They promote a culture of continuous improvement, open communication, and mutual accountability, ultimately contributing to the overall success and stability of the organization.

Within Montana, districts vary in their evaluation processes for School Business Officials (SBOs). In some districts, the SBO reports directly to the Board of Trustees and is typically evaluated in January or February, aligning with the Superintendent's evaluation schedule. SBOs should always have the option to request a closed session for their evaluation if they prefer privacy. In other districts, the evaluation is conducted by the Superintendent or a combination of the Board and Superintendent. Regardless of who conducts the evaluation, it is crucial that evaluators thoroughly understand all aspects of the SBO's role. This ensures a fair and comprehensive assessment of their performance.

The benefits of annual evaluations include:

- **Career Growth:** Evaluations can highlight opportunities for professional development, training, and career advancement, fostering employee growth and satisfaction.
- **Skill Enhancement:** By identifying skill gaps, employers can provide necessary training to enhance employee capabilities.
- **Constructive Feedback:** Evaluations provide a formal opportunity for managers to give constructive feedback, helping employees understand how their work is perceived and how they can improve.
- **Two-Way Communication:** They facilitate open dialogue between employees and management, promoting mutual understanding and addressing any concerns.
- **Recognition of Achievements:** Acknowledging accomplishments during evaluations can boost employee morale and motivation.



- **Record Keeping:** They create a documented history of an employee’s performance, which can be useful for future reference, promotions, or disciplinary actions.
- **Employee Retention:** By addressing employee concerns and providing clear pathways for growth, evaluations can enhance job satisfaction and reduce turnover.
- **Compliance:** Regular evaluations ensure that performance assessments are consistent and fair, providing documentation that can protect the District in legal disputes related to employment decisions. **See Appendix C- sample goal setting & evaluation tools.**

### Methods of Conducting Employee Evaluations

Common methods that can be incorporated into the evaluation process for school business officials may include:

- **Goal Setting:** This allows both the supervisor and the employee to supply goals for the coming year. In subsequent years, these goals are reviewed, and new goals are created.
- **Standardized Scale:** The supervisor rates the employee using a scale system. This can be combined with goal setting.
- **Self-Assessment:** This can be incorporated into most methods and gives the employee an opportunity to objectively reflect on their performance, consider what they have done well and where they have fallen short, and then share their perspective with their supervisor.
- **Gap Analysis:** Recognizing the value of self-evaluation, in this method both the supervisor and employee fill out the standardized scale evaluation. Gaps are identified between the employee and supervisor’s view of the employee’s role and leadership competencies. These “gaps” can then become areas as a focus for discussion and goal setting.



## MASBO CERTIFICATION PROGRAM & ASSOCIATION OPPORTUNITIES

**Certification:** We encourage members to continue to challenge themselves and grow throughout their career. MASBO provides a comprehensive and robust certification program that requires the passage of three in-depth tests covering the following areas.

- Board Minutes/Meetings
- Elections
- Payroll
- Pupil Transportation
- School Finance
- Personnel Management
- Student Activity Accounting
- Purchasing/Supplies Management
- Food Service
- School Law
- Risk Management
- Records Management
- Facilities Management
- Ethics
- Bonds and Bond Elections



An applicant must:

- attend and complete 120 hours of curriculum of coursework related to the position of District Clerk/SBO.
- within a 3 year period achieve at least a 70% on 3 tests designed to show proficiency in the subject areas of testing,
- complete 120 hours of additional coursework.
- The applicant must maintain current active membership status during the testing process.

Please support your District's SBO in their certification endeavors.

## MASBO CERTIFICATION PROGRAM & ASSOCIATION OPPORTUNITIES

**Association Opportunities:** MASBO relies on the wealth of knowledge our veteran members provide. We encourage our membership to give back to the organization in a variety of ways.

- Presenting training materials to other members.
- Serving on a committee or initiative.
- Assisting in legislative advocacy.
- Serving on the MASBO Board.
- Serving on related boards including insurance, worker's compensation, unemployment, or other areas of expertise.
- Mentoring new SBO's.

Supporting your District's SBO in these endeavors is the key to the success of your employee, the district, and the public schools across the state.



## MASBO SERVICES & RESOURCES

MASBO is dedicated to fostering excellence in school business management throughout the state. Our mission is to provide unwavering support and resources to our members, particularly during periods of transition or financial complexity within school districts.

MASBO offers a range of services tailored to meet the unique needs of school business officials. In instances where districts find themselves without a District Clerk or School Business Official, MASBO stands ready to provide on-site assistance and training. Our team can step in to help navigate financial puzzles or provide emergency services, allowing districts to focus on essential daily tasks.

We understand the importance of professional development, which is why MASBO offers comprehensive training programs. From new SBO training sessions held quarterly, to monthly check-in webinars for members, we strive to ensure that our members have access to the latest industry updates and best practices. Additionally, our website serves as a hub of valuable resources, including training slides, documents, calendars, and an in-depth monthly newsletter.

MASBO also administers certification testing, providing school business officials with the opportunity to demonstrate their expertise and commitment to excellence. Our certification program sets a standard of professionalism within the field and helps to ensure that school districts are led by competent and qualified individuals.

Furthermore, MASBO advocates on behalf of our members at both the state and national legislative levels. We believe in giving our members a voice in shaping policies that affect Montana's public schools.

In addition to our advocacy efforts, MASBO partners with corporate organizations to provide additional resources and expertise. Through these partnerships, we aim to enhance the support available to our members and further promote excellence in school business management.

Overall, MASBO is more than just an association; we are a community of dedicated professionals working together to advance the field of school business management in Montana.

Please do not hesitate to reach out to us for assistance.



# Appendix A1- Job Descriptions

## Sample One

### Job Description

Job Title: BUSINESS OFFICIAL/DISTRICT CLERK  
Classification: Administrator  
Reports To: Superintendent of Schools/Board of Trustees  
FLSA Status: Exempt/Classified

**SUMMARY:** Coordinates and oversees the workflow of the Central Administrative Office including: Accounts Payable/Receivable, Payroll and General Office Administration. Responsible for providing accurate, timely reporting of financial and statistical data pertaining to the school district. Works closely with Superintendent, Administrators, and other District personnel in determining the most cost-effective, beneficial allocation of school monies. Also responsible for overseeing and coordinating activities and personnel in the Instructional Media Center, Maintenance, School Food, Technology, Community Education, and Transportation Departments. As District Clerk, will attend all meetings of the Trustees to keep an accurate account and permanent record of the proceedings of each meeting.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** Other duties may be assigned

#### Administration of Budget/Revenue: (On-going)

- Coordinates efforts between schools/departments to determine needs and projected costs.
- Develops plans to raise revenues for projected expenditures.
- Conducts financial analysis and develops a tentative budget, works with Superintendent and Administrators to make recommendations to the Board concerning allocation of funds.
- Prepares final budget for publication.
- Bids out and monitors all insurance: property and liability; health/life/disability.
- Member of Insurance Committee.
- Bids out all capital projects.
- Monitors supply bids and central supply store.
- Assists Board with cost analysis for negotiations.

#### Funds Management: (Monthly)

- Coordinates, oversees and performs maintenance of accurate records/books for all funds by recording all expenditures, receipts, investment records and transfers.
- Monitors all activity on funds, including Student Activities.
- Balances books and prepares applicable reports in a timely manner.
- Researches and reconciles any discrepancies.
- Recommends allocation of excess funds.

Federal Funds: Title I Part A, Carl Perkins, VoEd, Title II Part A; any other special Federal & State Grants including Vocational Grants.

- Coordinates fiscal management of grants with Curriculum Director/Principals/Superintendent.
- Develops sound fiscal plans for future grant programs in conjunction with Curriculum Director.
- Maintains all permanent records concerning grants.
- Helps prepare and submit consolidated applications.
- Prepares all close-out reports.
- Provides information for all Federal audits.

Building Reserve Funds:

- Coordinates with Administrators and Maintenance Supervisor to determine the most cost-effective allocation of building maintenance Funds.
- Monitors tax collections/delinquencies and investments.

Monitors: Traffic Education Program, Rental Fund, Transportation Fund, Bus Depreciation, Schedule, Tuition Fund, Community Education and Adult Education.

Accounting: (Monthly)

- Opens and closes all accounting records as directed by State regulations and audit recommendations.
- Balances each fund and prepares reports for Treasurer.
- Researches and reconciles any discrepancies in purchase orders, accounts payable, contract salaries, and employee benefit encumbrances.
- Balances all ledgers, accounts, vouchers, contracts, etc.
- Coordinates and prepares for audits of all accounts and records by independent Certified Public Accountants selected by the Board.
- Researches and reconciles any discrepancies.
- Monitors County Treasurer revenues and interest payments.

Payroll:

- Supervises payroll administration.
- Monitors Worker Compensation claims and reports.
- Oversees the preparation of Quarterly Unemployment Reports, State Withholding Report, Federal Withholding Report, Workers Compensation Report, and Projected Ending Balance Reports.

Reports:(Annually)

- Prepares fiscal reports annually including Annual Trustee Report and Preliminary and Final Budgets.
- Prepares Annual Federal reports for Title funds, Drug/Alcohol, VoEd, Carl Perkins, Special Education, and Adult Basic Education.
- Prepares year-end reports for Auditor.

General Office Duties/Personnel: (On-going)

- Coordinates and oversees the workflow in the Central Office.
- Insures proper licensing of all school vehicles.
- Recruits, selects and trains all personnel in Central Office.
- Conducts performance appraisals on subordinate staff.
- Ensures the Superintendent, Clerk, Treasurer, Administrators, Director of Business Services, and Secretary are bonded per Board policy.

#### Fixed Assets: (Annually)

- Maintains accurate up-to-date inventory of fixed assets and allows for the capitalization of all assets in the General Fixed Assets Account Group.

#### Exhibits acceptable work habits and performs tasks in a professional manner:

- Is regular in attendance and punctual for work.
- Organizes work and manages time to achieve efficiency and high quality of work.
- Performs tasks neatly and accurately in accordance with desired quality and quantity.
- Is conscientious in performing tasks on time and meeting established deadlines.
- Produces a high quality of work in an effective and efficient manner.
- Initiates tasks in a self-directed manner and performs work with a minimum of supervision.
- Maintains work area and assigned equipment in a neat orderly fashion.

#### Works cooperatively and effectively with staff, students, supervisors and the public:

- Exhibits a pleasing, courteous professional disposition in performing tasks assigned.
- Exhibits a willingness to accept constructive criticism.
- Strives to improve weak areas of performance.
- Active in community activities.

#### Exhibits an overall motivation to succeed in the position:

- Works diligently to make a job more efficient and effective.
- Seeks to improve quality and quantity of tasks performed.
- Provides positive feedback to supervisor(s) for implementing ideas which will make the work assigned more effective and efficient.

#### Possess a thorough knowledge of the scope of work to be performed:

- Understands the overall scope of work to be performed and masters the details of individual tasks.
- Understands/follows basic rules and regulations involved with the scope of work to be performed.
- Understands and keeps up-to-date on changes in Federal and State laws.

#### Exhibits desirable personal characteristics:

- Maintains proper grooming consistent with the type of task being performed.
- Communicates effectively using proper grammar and language, orally and in writing.
- Maintains self-control and a friendly, outgoing disposition.
- Maintains confidentiality of related work matters as applicable.

#### District Clerk Responsibilities:

- Performs all District Clerk tasks as outlined by School Law of Montana 20-3-325, MCA, and the Board of Trustees.
- Advise the board on financial and operational constraints as outlined by law and assist the board in ensuring all district policies comply with local, state, and federal laws.
- Attends all meetings of the Board of Trustees and keeps an accurate and permanent record of all proceedings of each meeting, and if unable to attend ensure a qualified designee maintains an accurate permanent record.



- Acts as the custodian of all documents, records, and reports of the trustees, including the trustees' report required under 20-9-213. Designs, maintains, and supervises a system of filing and securing all documents, records, and reports of the Board of Trustees.
- Serve as a member of the administrative team, working closely with the district superintendent and other administrative staff to align the educational goals and financial stability of the district.
- Serves as the District Election Administrator
  - Directs, monitors and supervises all activities related to School Board, general and special levy elections.
  - Circulates petitions for bond and general elections
  - Posts all election notices in appropriate voter precincts.
  - Secures and supervises all election judges.
  - Directs and supervises election balloting process and prepares final results for Board approval and action.
- Serves as a liaison during any financial and labor audits as required.

The above performance responsibilities are not all inclusive and may be altered or added to by the Superintendent of Schools or Board of Trustees.

**MINIMUM QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE:** Bachelor of Science degree in a business-related field. Management/supervisory experience and a working knowledge of public-school fiscal management preferred.

**KNOWLEDGE, SKILLS, AND ABILITIES:** Knowledge of general accounting procedures, general management practices, general office practices and procedures, and network systems. Skills in use of computers, Windows based software programs, advanced accounting software, and strong skills in the use of spreadsheets. Abilities to use basic office equipment: copy machine, calculator, fax machine, multi-line telephone system, and postage machine.

**LANGUAGE SKILLS:** Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public both in writing and orally.

**MATHEMATICAL SKILLS:** Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs. Must be strong in algebra and formula based computations.

**TECHNOLOGY SKILLS:** The work environment has increasingly become technology driven. \_\_\_\_\_ Public Schools expects staff to meet reasonable expectations in the use of computers and other technology.



**REASONING ABILITY:** Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**PHYSICAL DEMAND:** While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee frequently is required to stand, walk, and reach with hands and arms. The employee is occasionally required to climb or balance; stoop, kneel, crouch. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. The employee will occasionally need to work long hours.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts. The employee is occasionally exposed to fumes or airborne particles.

**PERSONAL CHARACTERISTICS:** Employees of \_\_\_\_\_ School District #\_\_\_\_ must exhibit acceptable work habits and perform tasks in a professional manner by adhering to the following guidelines: Maintain proper grooming and dress consistent with the type of task being performed; be regular in attendance and punctual for work; initiate tasks in a self-directed manner and perform work with a minimum of supervision; organize work and manage time to achieve efficiency and high quality of work; perform tasks neatly and accurately in accordance with desired quality and quantity; provide positive feedback to supervisor(s) for implementing ideas which will make the work assigned more effective and efficient; maintain self control and a friendly, outgoing disposition; and maintain confidentiality of related work matters as applicable.

**DRUG FREE WORKPLACE:** Screening tests for alcohol and illegal drug use may be required before hiring and during your employment in School District #\_\_\_\_. Employees of the \_\_\_\_\_ Public Schools must submit to a fingerprint criminal background check. Any appointment will be contingent upon the results of the criminal background report received from the Department of Justice, which must be acceptable to the Board of Trustees, in its sole discretion.

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

## *Sample Two*

TITLE: Business Manager

QUALIFICATIONS: Administrative experience preferred.  
Data process skill and word processing skills required.  
Emphasis in budget and finance planning preferred.  
Comprehensive knowledge of government accounting  
Such other qualifications as specified by the Board of Trustees.

REPORTS TO: Superintendent & Board of Trustees

JOB GOAL: The Business Manager is responsible to the Superintendent for directing and coordinating district-wide financial management activities involving all school funds; for directing and coordinating business service activities including administrative data processing functions, and use and rental of facilities; and for the performance of related administrative responsibilities incident to the above. The Business Manager functions as a primary resource person in the areas of school finance, revenue structures and business management systems. The Business Manager also serves as District Clerk responsible for the activities required by law and directed by the Board of Trustees.

### PERFORMANCE RESPONSIBILITIES & DUTIES: ADMINISTRATIVE

1. Accounts to the Superintendent for compliance with all policies adopted by the Board, and all pertinent rules, regulations and laws; and suggests to the Superintendent new policies that may be needed.

2. Manages the business services of the school district.

3. Communicates requests or problems requiring Board of Trustees action to the Superintendent on behalf of business services.

4. Collaborates with administrative and instructional officers in planning, coordinating, and implementing systems of operations.

5. Interprets district policies and practices as they relate to the business and financial services in the schools to other administrative departments.

6. Serves as a member of the Superintendent's administrative team.

7. Collaborates with administrative and instructional officers in long-term planning for facilities.

8. Assumes responsibility for any and all other duties assigned by the Superintendent/ Board of Trustees.

### ACCOUNTING & FINANCIAL REPORTING

1. Establishes) directs and supervises all operational and payroll accounting procedures for all school district funds (budgetary, non-budgetary, and student activity funds.

2. Properly records expenditures relating to the adopted budget and reports trends or relationships he/she feels are significant to the Superintendent. Contacts any individual involved in budgetary, financial, or property accounting activities as necessary to insure proper management.
3. Monitors school district revenue collections for cash flow management.
4. Implements and monitors internal control activities for auditing purposes.
5. Prepares monthly and annual financial reports of all school district funds for the Superintendent and Board of Trustees and oversees the financial data base reporting system of the district continuously.
6. Supervises the investment program of the school district funds in conjunction with other involved governmental agencies.
7. Receives all written requests for budget transfers and prepares them for submission to the Superintendent for his/her approval.
8. Coordinates all insurance programs of the District, including fire, extended coverage, contents, general liability, vehicles, wrongful acts and legal liability, employee benefits, and students and athletics.
9. Reviews copies of all applications for federal, state, or local projects that involve revenue and expenditures prior to submission to the Superintendent for approval.
10. Directs and supervises the fixed asset accounting procedure.
11. Reviews all proposed Board of Trustee resolutions for the appropriation of funds.
12. Recommends approval for contracted service agreements and other contracts entered into by the school district.
13. Cooperates fully in an annual external audit of district operations.
14. Determines and distributes an approved designated vendor list to budget managers.
15. Implements and monitors purchasing policies and procedures.

## BUDGET & FINANCIAL PLANNING

1. Prepares recommendations for budget development procedures and schedule of activities and submits these to the Superintendent.
2. Prepares statistical data and projections (enrollments, revenues, and expenditures) for budget development and planning.
3. Prepares preliminary general fund budget proposals of revenues and expenditures for special levy purposes.

4. Develops and distributes prospectus of special levy information.
5. Prepares final budget documents for the Superintendent and Board of Trustee approval.
6. Develops recommendations for long-range financial planning.

#### DISTRICT CLERK

1. Advise the board on financial and operational constraints as outlined by law; assist the board in ensuring all district policies comply with local, state, and federal law  
Prepares annual, quarterly, and monthly financial reports as required by law.
2. Serves as a member of the administrative team, working closely with the district superintendent and other administrative staff to align the educational goals and financial stability of the district.
3. Attends all Board of Trustee meetings and maintains an accurate and permanent record of the proceedings of each meeting, and if unable to attend ensure a qualified designee maintains an accurate permanent record.
4. Acts as the custodian of all documents, records, and reports of the trustees, including the trustees' report required under 20-9-213.
5. Maintains accurate and detailed accounting records of all financial transactions of the district.
6. Serves as a liaison during any financial and labor audits as required; and
7. Serve as the election administrator for the district unless the county is administering an election at the request of the district.
8. Prepares annual tuition rates for Board of Trustee approval.
9. Assumes responsibility for any other duties as Clerk of the Board as prescribed by law or assigned by the Board of Trustees.
10. Prepares agendas for each board meeting and posts agendas and notifies board members.

TERMS OF EMPLOYMENT: Twelve month year. Salary and benefits 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 Services Personnel.

## Sample Three

\_\_\_\_\_ Public School

### Clerk/Business Manager Job Description

School District Clerk

#### RESPONSIBILITIES:

The position of Clerk is defined by law. The Clerk is considered to be an employee of the Board of Trustees rather than a public officer and is directly responsible to the Board of Trustees.

#### DUTIES:

1. The Clerk of the District shall attend all meetings of the Trustees and keep an accurate and permanent record of the proceedings of each meeting. (MCA 20-3-325)
2. If the Clerk is not present at a meeting, the Trustees shall have one of its members or a district employee act as Clerk for such meeting, and such person shall supply the Clerk with a certified copy of the proceedings. (MCA 20-3-325)
3. Advise the board on financial and operational constraints as outlined by law; assist the board in ensuring all district policies comply with local, state, and federal laws.
4. Serve as a member of the administrative team, working closely with the district superintendent and other administrative team, working closely with the district superintendent and other staff to align the educational goals and financial stability of the district.
5. The Clerk of the District shall be the custodian of all documents, records, and reports of the district, (MCA 20-3-325), maintain accurate and detailed accounting records of all financial transactions of the district.
6. Serve as a liaison during any financial and labor audits as required.
7. Unless the Trustees provide otherwise, the Clerk shall:
  - Keep an accurate and detailed accounting record of all receipts and expenditures of the district in accordance with the financial administration provisions of Title 20-3-325, and
  - Prepare the annual trustees' financial report; to report annually to the County Superintendent as required, the financial activities of each fund maintained by the district during the last completed school fiscal year on the forms prescribed and furnished by the State Superintendent of Public Instruction. (MCA 20-3-325)
8. Must be able to maintain confidentiality.

#### BUSINESS MANAGER

The Business Manager is the Financial Officer of the District. This includes responsibility in areas of accountability for Double Entry Generally Accepted Accounting Principles (GAAP).

The Business Manager is directly responsible to the Superintendent/Board of Trustees, and is responsible to accomplish the fulfillment of the duties set forth below. The Business Manager is responsible for advising the District Superintendent in the function and maintenance of the District's Business affairs.

## DUTIES

1. The Business Manager is responsible for the financial accounting of the general operation of the district, including buildings and grounds, special services, transportation, school food service, data processing, federal programs, purchasing, collective bargaining, adult education, cost analysis, labor relations, building projects, inventory control, and bonding requirements.
2. The Business Manager is responsible for being knowledgeable of current employment laws, rules and regulations as set forth by State and Federal standards.
3. The Business Manager is responsible for being knowledgeable of current requirements of the Office of Public Instruction and the County School Superintendent's Office.
4. The Business Manager is responsible for keeping the Board of Trustees informed as to the status of the business affairs of the district.
5. The Business Manager is responsible for maintaining records of fixed assets of the district as set forth by the Board of Trustees.
6. The Business Manager is responsible for assisting with site and/or building acquisition and sales and disposal of property, administering rentals, leases, assessments and taxes according to state laws.
7. The Business Manager is responsible for the custody of permanent financial records and other legal papers.
8. The Business Manager is responsible for assisting the Superintendent with the budget development process with the needs of the district as determined by the Board of Trustees. This includes long term fiscal planning, receipt estimation, budget control, and fiscal relations with other governmental agencies.
9. The Business Manager is responsible for administering existing school budgets according to state law and school district policy.
10. The Business Manager is responsible to execute all functions of the district's business operations and administration within the legal framework of all applicable legal statutes and requirements of the State of Montana and the Board of Trustees.
11. 1. The Business Manager shall contribute to the board meeting agenda for regular and special board meetings, meet as needed with Board Committees, advise the Superintendent and Board of Trustees in all matters that will ascertain that the District and its agents act in accordance with contracts entered into by the District, and assist



the Superintendent to keep the Board of Trustees informed of all state and federal regulations under which the District is legally bound.

12. A. The Business Manager shall maintain strict accounting for the:

- General Fund
- Reserve/Endowment and Trust Funds
- Building Funds
- Internal Accounts (Food Services, Traffic Ed)
- Student Activity Funds
- Voucher and Payroll Processing (Payroll and Claims Clearing)
- Compensated Absences Fund
- Special Funds (Flexibility, Technology)
- Cost Accounting
- Transportation and Bus Depreciation Funds
- Retirement Fund
- Tuition Fund
- Adult Education Fund
- Miscellaneous Federal Program Funds

B. Manage the debt service and capital funds in terms of:

- Long and short-term financing
- Maturities and debt payments
- Long-range capital programs
- Investments
- Reporting
- Debt service payment procedures
- Local bonding credit data-bond prospectus
- Short-term debt management

C. Establish pre-audit and post-audit procedures

D. In matters of personnel management, aide the Superintendent and Board of Trustees regarding:

- Hiring laws and regulations
- Sick leave, vacation leave, personal leave, bereavement leave, maternity leave, association leave, school related leave, civic duty leave, legislative leave, extended leave, sabbatical leave, and leaves of absence.
- Insurance provided

E. Assist with insurance matters in respect to:

- District Insuring policies and specifications
- Insurable values-buildings and contents
- Coverages to be provided
- Claims and reporting
- Insurance procurement procedures
- Insurance and claims records

F. Provide a continuous program of cost analysis

G. Make arrangements for legal advertising

H. Provide statistics, reports and research pertaining to the business operations as requested by the Board of Trustees.

I. Cooperate in state and national surveys.

J. Be encouraged to participate in professional business organizations.

13. Perform other such duties as may be required by the Superintendent or Board of Trustees.

14. The Business Manager shall act as the Election Administrator for all District elections, including the annual trustee election, levy elections, bond elections, building elections and other special elections.

15. Must be able to maintain confidentiality.

DESIRED MINIMUM QUALIFICATIONS - CLERK:

Clerk-One year experience in typing and general clerical work; high school diploma or equivalent; or any combination of training and/or experience that could likely provide the desired knowledge and abilities.

Basic arithmetic, filing, and record-keeping procedures. Ability to compile complete and accurate minutes.

Proficiently operate standard office equipment, including copier, computer terminal, word processor, etc.

Communicate effectively with students, public and staff.

Compile and maintain accurate and complete records and reports in a timely manner.

Understand and carry out oral and written instructions.

Maintain cooperative working relationships with those contacted in the course of work.

Ability to manage stressful situations.

Ability to maintain confidentiality of employment and student matters.

Ability to effectively manage time and responsibilities.

DESIRED MINIMUM QUALIFICATIONS – BUSINESS MANAGER:

Hold a Bachelor’s degree with a major in accounting, economics, or finance or related field.

Five or more years of progressively responsible leadership experience in and/or familiarity with school finance.

Knowledge of finance and budgeting principles.

Strong leadership and communication skills.

Able to establish and maintain effective working relationships with students, staff and the community.

Able to express himself/herself clearly and concisely in both oral and written communications.

Able to perform duties with an awareness of all District requirements and Board policies.

#### EQUIPMENT USED:

Computer, calculator, copier, telephone/voice mail, fax machine.

#### WORK ENVIRONMENT:

While performing the duties of this job, the employee regularly works around others, works with the public and works inside. The employee must be able to meet deadlines with severe time constraints.

The noise level in the work environment is usually moderate.

#### PHYSICAL DEMANDS:

While performing the duties of this job, the employee is frequently required to sit; occasionally walk and stand; talk or hear; twist at neck and waist; kneel. Specific vision abilities required by this job include close vision, distance vision, depth perception, and the ability to adjust focus. The employee is required to be able to hear conversations in quiet environments. The employee is occasionally required to use hands/fingers, handle or feel objects, tools, or controls; reach with hands and arms. May be required to lift or move up to 20 pounds.

#### MENTAL/MOTOR DEMANDS:

While performing the duties of this job, the employee often performs routine work. The employee frequently exercises flexibility (ability to shift from one task to another). Guidance and reinforcement are usually available. The employee frequently works within time constraints and maintains attentiveness intensity. The employee is frequently involved in social interactions which require oral and written communications. Memory, reasoning, and exercising judgment are constantly used/required on the job. Mathematics, estimating, and problem solving are frequently used/required on the job.

The physical demands, work-environment characteristics, and mental/motor demands described within this job description are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

For those classified employees employed under a written contract for a specified term, nothing contained in this job description shall create a property right beyond the specified duration of the employment contract.

## Sample Four

DISTRICT CLERK  
REPORTS TO: Board of Trustees  
FLSA Designation: Exempt

### UNIVERSAL OBLIGATIONS/EXPECTATIONS OF EACH STAFF MEMBER

It is the expectation of the District that each staff member will: (1) put the safety, health and well-being of students at the forefront of all actions, job responsibilities and decisions, and (2) undertake all duties in alignment with the District's Strategic Plan.

### ESSENTIAL FUNCTIONS:

- advise the board on financial and operational constraints as outlined by law.
- serve as a member of the administrative team, working closely with the district superintendent and other administrative staff to align the educational goals and financial stability of the district.
- assist the board in ensuring all district policies comply with local, state, and federal laws.
- attend trustees' meetings and ensure that a permanent record is maintained as required by law, and if unable to attend ensure a qualified designee maintains an accurate permanent record.
- act as the custodian of all documents, records, and reports of the trustees, including the trustees' report required under 20-9-213.
- maintain accurate and detailed accounting records of all financial transactions of the district,
- serve as a liaison during any financial and labor audits as required; and
- serve as the election administrator for the district unless the county is administering an election at the request of the district."

### DETAILED DUTIES:

- Taking and maintaining accurate minutes of meetings of the Board of Trustees.
- Acts as custodian of all records and documents of the district, including but not limited to personnel files, student records, financial records, property records, and minutes.
- Keeping accurate and detailed accounts of all receipts and disbursements.
- Drawing and countersigning all warrants for expenditures.
- Responsible for the preparation of all notices for School Board meetings and elections.
- Preparing and submitting financial reports to the superintendent and the Board as requested.
- Preparation of Board packets.
- Processes all authorized invoices.
- Maintains records of paid/unpaid invoices and purchase orders.
- Assists in budget preparation and with audits.
- Processes payroll data for all School District employees and prepares payroll checks for distribution.
- Maintains up-to-date files of all payroll information.
- Responsible for employment forms, including but not limited to retirement, IRS, and W-2's.
- Communicating with governmental agencies, labor organizations, TRS, and PERS to provide information.

*Only minimum duties are listed. Other functions may be required as given or assigned.*

#### DESIRED MINIMUM QUALIFICATIONS:

- One year experience in typing and general clerical work; high school diploma or equivalent; or any combination of training and/or experience that could likely provide the desired knowledge and abilities.
- Basic arithmetic, filing, and record-keeping procedures.
- Proficiently operate standard office equipment, including copier, computer terminal, word processor, etc.
- Communicate effectively with students, public, and staff.
- Compile and maintain accurate and complete records and reports.
- Understand and carry out oral and written instructions.
- Maintain cooperative working relationships with those contacted in the course of work.
- Type at a net corrected speed of fifty words per minute.
- Ability to manage stressful situations.
- Ability to maintain confidentiality of employment and student matters.
- Ability to effectively manage time and responsibilities.

#### EQUIPMENT USED:

A variety of electronic and technology devices,, copier, telephone/voice mail, fax.

#### WORK ENVIRONMENT:

While performing the duties of this job, the employee regularly works inside. The employee must be able to meet deadlines with severe time constraints. The noise level in the work environment is usually moderate.

#### PHYSICAL DEMANDS:

While performing the duties of this job, the employee is frequently required to sit; occasionally walk and stand; twist at neck and waist; kneel. Specific vision abilities required by this job include close vision, distance vision, depth perception, and the ability to adjust focus. The employee is required to be able to hear conversations in quiet environments. May be required to lift or move up to twenty pounds.

#### MENTAL/MOTOR DEMANDS:

While performing the duties of this job, the employee often performs routine work. The employee frequently exercises flexibility (ability to shift from one task to another). Guidance and reinforcement are usually available. The employee frequently works within time constraints and maintains attentiveness intensity. The employee is frequently involved in social interactions which require oral and written communications.

The physical demands, work-environment characteristics, and mental/motor demands described within this job description are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

For those classified employees employed under a written contract for a specified term, nothing contained in this job description shall create a property right beyond the specified duration of the employment contract.

# Appendix A2- Position Posting

## Position Posting Sample

\_\_\_\_\_ELEMENTARY SCHOOL DISTRICT #\_\_\_\_\_

Position: District Clerk & Business/Office Manager

Hours: Full time Monday – Friday during Academic Year; flexible hours during vacations.

Days: 210 to 230 days (negotiable).

Salary: DOE; benefit in lieu of insurance available

Closing Date: 3:00 p.m. Thursday, \_\_\_\_\_, or until filled

Start Date: \_\_\_\_\_. Training to be provided.

Duties include:

- Acts as Clerk to the School Board of Trustees
- Acts as custodian of all documents, records and reports of the Trustees
- Maintains and prepares financial records
- Completes monthly Payroll & Claims
- Administers school district elections
- Prepares and monitors annual budget; purchases supplies
- Maintains educational, health, transport, personnel records and prepares State and Federal reports
- Assists with the daily operations of the District
- Performs a wide variety of clerical and secretarial work
- Other duties as necessary and/or assigned

Minimum Qualifications:

- Three years experience in accounting, economics, or finance or related field; high school diploma or equivalent; or any combination of training and/or experience that could likely provide the desired knowledge and abilities.
- Able to express himself/herself clearly and concisely in both oral and written communications.
- Proficiently operate standard office equipment, working knowledge of Excel, Word; and accounting software (Black Mountain) advantageous.
- Ability to work independently, effectively manage time and responsibilities with minimal supervision.



Pre-employment requirements:

- Successful applicant must pass a criminal background check.

To Apply:

Send completed application (available at (school website)), letter of interest, resume, three references, and college transcript, if applicable or other certifications to:

Name – Principal

\_\_\_\_\_ Elementary School

Address

Email Address

# Appendix A2- Position Posting

## VETERANS' PREFERENCE

*This information and sample are in no way to be considered legal advice. Please check with your legal team to ensure your policies, handbooks and postings are in line with one another and meet all state and federal compliances.*

### **Veterans' Preference Explanation for Position Announcements**

**Veterans' Preference** is a policy designed to give eligible veterans a competitive edge in the hiring process for public sector jobs. In Montana, as in many other states, veterans who have served honorably are entitled to certain preferences when applying for positions within public institutions, including school districts.

**What is Veterans' Preference?** Veterans' Preference means that qualified veterans, and in some cases their spouses or surviving spouses, receive additional consideration during the hiring process. This policy aims to recognize and honor the service of veterans by facilitating their transition into civilian employment.

**How Does It Work?** When a veteran applies for a position, their application is given additional weight compared to non-veteran applicants. This can include extra points added to their examination scores or a guaranteed interview if they meet the minimum qualifications for the job. The exact application of the preference can vary depending on state and local regulations.

### **Eligibility Criteria To be eligible for Veterans' Preference in Montana:**

The applicant must have served on active duty in the U.S. Armed Forces and have been discharged or released under honorable conditions. Certain spouses and surviving spouses of veterans may also be eligible under specific conditions.

### **Inclusion in Job Announcements:**

Employers, including school districts, should clearly state in their job announcements that they adhere to Veterans' Preference policies. This ensures transparency and informs potential applicants about their rights and the additional consideration they might receive.

### **Sample Position Announcement Inclusion**

*"We are committed to honoring our veterans and supporting their transition to civilian employment. As part of our commitment, we offer Veterans' Preference to eligible applicants in accordance with Montana state laws. Eligible veterans and their spouses are encouraged to apply. Please indicate your veteran status on your application to ensure you receive the appropriate preference."*

By incorporating this explanation and sample inclusion in your position announcements, you can ensure that your job postings are compliant with Veterans' Preference policies and clearly communicate this important information to potential applicants.

# Appendix A2- Position Posting

## Equal Opportunity Sample Statement

***This information and sample are in no way to be considered legal advice. Please check with your legal team to ensure your policies, handbooks and postings are in line with one another and meet all state and federal compliances.***

### Sample Equal Opportunity Statement for a Position Posting

[School District Name] is an equal opportunity employer. We are committed to creating an inclusive environment for all employees and applicants for employment. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or any other characteristic protected by law. We value diversity and are dedicated to providing an equitable and inclusive environment for our students, staff, and the broader community.

If you require accommodation during the application or interview process, please contact :\_\_\_\_\_.

[Contact Information] [Application Deadline] [Application Instructions]

This statement ensures compliance with federal and state laws, promotes diversity, and provides information on accommodations for applicants requiring assistance during the hiring process.

# Appendix B-

## Interview Questions

### Sample One

1. *Outline your training and job experiences as it relates to the position for which you are applying.*
2. *Describe an office setting where you have worked and your role and responsibilities in that office setting.*
3. *In your previous job(s), what types of funds have you been responsible for maintaining and what software program(s) have you used for fund accounting?*
4. *Please describe the software programs you have used for other business functions.*
5. *Please describe your familiarity with school finances or accounting procedures.*
6. *Please describe your work experience with federal and/or state grants.*
7. *What types of records have you been responsible for maintaining?*
8. *As the Cooperative Business Manager / Clerk, you receive financial statements from the County Treasurer's office. One of the statements you receive shows a discrepancy in one of the funds. What steps would you take to reconcile this?*
9. *Please describe your experience in preparing financial or fiscal reports.*
10. *On a scale of 1-3 (1 = needs improvement, 2 = meets expectations, 3 = exceeds expectations) please rate yourself on the following employee attributes:*
  - *Organizational skills* \_\_\_\_\_
  - *Reliability* \_\_\_\_\_
  - *Work Independently* \_\_\_\_\_
  - *Trustworthiness* \_\_\_\_\_

- Flexibility \_\_\_\_\_
- Work well with others \_\_\_\_\_
- Confidentiality \_\_\_\_\_
- Professional Judgement \_\_\_\_\_
- Approachability \_\_\_\_\_
- Flexible thinking \_\_\_\_\_
- Problem-solver \_\_\_\_\_
- Collaborate \_\_\_\_\_
- Work as a team \_\_\_\_\_

11. How would your most recent supervisor describe your strengths as well as your areas needed for growth as an employee?

12. Describe a work-related conflict that you have experienced and what steps you took to resolve it? Was your approach effective? Why or why not? What would you do differently next time?

13. What does it mean to be a public servant?

14. Why do you want this job?

15. What is one thing about yourself that you want me to know and remember about you as I review your application materials and your responses to these interview questions?



## *Sample Two*

- Please describe your educational background and professional experience and relate how they may support your success as our next Business Manager in SD #\_\_\_\_\_. (This question is mainly designed to “break the ice,” but the answer should reflect an understanding of the functions for this position and should provide a basic understanding of the candidate’s skills.)
- Why are you interested in this position (Business Manager/Clerk) with the \_\_\_\_\_ School District? (Open ended but look for desire to accept new challenges, personal and professional growth, desire to impact the direction of education, goals, etc.)
- If you're selected for this position, describe your first 6 months on the job. How would you get acclimated and who/what organizations could you rely on for support? (Look for a candidate that has researched the resources available to them through the OPI, MASBO, or other connections/mentors)
- Describe your experience with accounting and finance software. What is your level of experience or expertise with Black Mountain Software or State of Montana Reporting portals? (Experience with Black Mountain Software is desired as is experience in working state reporting requirements MAEFAIRS etc.)
- Please explain your knowledge or experience in preparing financial statements following generally accepted accounting principles as applicable to governmental entities or other organizations? (Look for previous experience, understanding of GAP accounting, background and experience in finance etc.)
- Describe your experience managing and performing accounting for federal (and other) grants. Explain any experience you have in working with vendors, preparing for an audit, or developing a budget system and process. (Look for experience specific to education finance or school situations.)
- Describe your approach to staying organized and how you manage large tasks, time constraints, and deadlines. (Responses should demonstrate a high level of proficiency with organizational tasks and responsibility.)

- What experience do you have managing elections? Can you explain for the committee what steps and processes are involved in running a successful election? (Look for a reference to Montana law as well as appropriate election timelines and a connection to the county election office.)
- Please explain your understanding of payroll accounting, human resource management, employment law, and benefit management. (Answers will vary but expertise and experience with these tasks is desired.)
- How do you manage or deal with conflict in the workplace? How would you manage a conflict with the superintendent or school board members? If possible, provide an example of a conflict situation that you handled effectively. (Open ended. Look for answers that acknowledge ethics as well as a chain of command.)
- Please tell the team about your experience with board meetings, open meeting laws, and Robert's rules of order? (Look for answers that indicate strong understanding of procedure and decorum. Specific references to Montana's open meeting laws and requirements are a plus.)
- This position requires strong communication skills and an ability to work with others inside and outside of the organization. Describe your skills in this area. What does customer service mean to you?
- Describe the relationship that should exist between a District Clerk and the board? administrative staff? Certified and classified staff? The community? (Look for developing and maintaining positive and trusting relationships as key; an atmosphere of trust and mutual respect is prized and encouraged on the part of students, teachers, parents and all employees of the school.)

This concludes the formal portion of the interview. Do you have questions for us?  
A couple of key points to consider:

Work Ethic. Did it come out clearly in the interview?

Management Style conducive to staff growth and understanding while still change friendly?

### Sample Three

#### ORAL INTERVIEW RATING FORM

CANDIDATE:      INTERVIEW DATE:

POSITION: Business Manager/Clerk of Board \_\_\_\_\_ School

INSTRUCTIONS: This rating form is to be completed independently, immediately after each interview and signed by the rater. Reference checks and preference points for individuals claiming veterans or handicapped preference will be added later. Please use the following scale when rating candidate responses:

5=Outstanding, 4,3=Satisfactory, 2,1=Unsatisfactory

Comments are required for any candidate you feel is not qualified. You are encouraged to comment and express your observations on any candidate:

QUESTIONS:      POINTS (5-1)

1. Please tell us about yourself and why you feel you are the best \_\_\_\_\_  
Candidate for the Business Manager/Clerk of Board position.
2. What specific characteristics do you have that would be beneficial \_\_\_\_\_  
to this position?
3. If selected for the position, what resources would you draw upon \_\_\_\_\_  
during the first six months to learn the position?
4. Please explain your knowledge or experience in preparing financial \_\_\_\_\_  
statements in accordance with generally accepted accounting  
principles as applicable to governmental entities or other organizations.
5. Explain your experience working under time constraints and multi-tasking. \_\_\_\_\_
6. Describe your experience managing and performing accounting for \_\_\_\_\_  
Federal and other Grants.
7. What are the key components and objectives of an internal control system? \_\_\_\_\_
8. Please tell us about your experience with Board Meetings, Open Meeting \_\_\_\_\_  
Laws, and Robert's Rules of Order.
9. Please provide us with an example of your contribution to an organization's \_\_\_\_\_  
Strategic plan.
10. This position requires working with others, both in the organization and \_\_\_\_\_  
outside, such as vendors and other agencies. What is your experience  
working with others?

Is there anything else you would like for us to know about your qualifications for this job, or do you have any questions to ask of us?

PERSONAL QUALITIES (Poise, enthusiasm, appearance, humor, tact, courtesy, confidence):

\_\_\_\_\_

COMMUNICATION SKILLS (Ability to express ideas, command of language, clarity of response):

\_\_\_\_\_

ORGANIZATIONAL ABILITY(Probable ability to assess, analyze, plan and implement District and Departmental needs; appropriate incremental meaningful communications with staff, etc.):

\_\_\_\_\_

COMMENTS: (Required for disqualified candidates.)

Signature of Rater:\_\_\_\_\_ Subtotal Points:\_\_\_\_\_  
(65 Possible)

# Appendix C- Goal Setting

## Sample One



### GOAL SETTING WORKSHEET

Employee Name:

Supervisor Name:

Date:

Goals Suggested By Employee:

Goals Suggested By Supervisor:

Goals Approved for the Next Fiscal Year:

Comments:

# Appendix C- Evaluations

## Sample One

### ROLE COMPETENCY EVALUATION

*This is intended as a sample. Choose the competencies specifically referenced in the job description of the employee.*

For each item, based on your knowledge of the performance of the employee, circle on the scale between 1 and 10. The scale is described below.

A comments section is included on the online form. Comments are encouraged but are required for any competency with a ranking below 5.

**1. BUDGETING AND LEVYING.**

Prepares the budget, presentation, and justification to the Board of Trustees, including the annual levies.

**2. FINANCIAL PLANNING.**

Prepares enrollment and long-range plans to meet the student and financial needs of the district. This may include multi-year projections of revenues and expenses and the feasibility of long-term funding for special projects and instructional improvement.

**3. CLAIMS AND REPORTING.**

Oversees the preparation of monthly claims for all funds, as well as corresponding reporting for federal and state programs. Oversees implementation of grants.

**4. ACCOUNTING AND FINANCE SYSTEMS.**

Performs functions related to accounting and reporting, which may include but is not limited to bills payable, transfer of funds and management of activity funds.

**5. BANKING AND INVESTMENTS.**

Manages banking relationships and ensures appropriate and effective investment of school district funds.

**6. AUDIT PREPARATION AND ANNUAL FINANCIAL REPORTING.**

Files a financial report annually for audit and implements audit suggestions on a timely basis.

**7. PURCHASING AND SUPPLY MANAGEMENT.**

Coordinates or oversees the purchase, maintenance, and inventory of all supplies, including purchase by competitive bidding and management of contracts as directed by the Montana Code Annotated and Board Policy.

**8. PERSONNEL MANAGEMENT.**

Supervises the staff accounting, payroll benefits and all related data in personnel administration.

**9. BOARD ASSISTANCE AND FACILITATION.**

Creates and maintains accurate minutes and/or records of all meetings, prepares notices in a timely manner, and assists the Board in the understanding of school financials, long-term strategic planning, and legislative changes.



**10. COLLECTIVE BARGAINING.**

Prepares pertinent fiscal data for negotiations, including data related to benefit programs.

**11. RECORDS MANAGEMENT.**

Oversees procedures and maintenance of district property, finance records and the annual financial audit.

**12. PROGRAM MANAGEMENT.**

Oversees the operation of the total school business services program including day-to-day district finance and business operations, recruitment, and evaluation of staff.

**13. INSURANCE AND RISK MANAGEMENT.**

Represents the district's interests in all insurance and risk management programs.

**14. TRANSPORTATION SERVICES.**

Administers or oversees the district transportation program and prepares and administers the budget.

**15. FACILITY OPERATIONS.**

Administers a program of plant operation and maintenance, security and property protection and community use of school facilities.

**16. PLANNING AND CONSTRUCTION.**

Participates in decision-making process and selection of professional services. Works with architects and contractors to ensure desired project results in construction and remodeling of facilities and understands and carries out the legal responsibilities of the district.

**17. FOOD SERVICE.**

Oversees all operations and contracts. Applies State and Federal guidelines for free/reduced meal subsidies. Takes part with regulatory agencies in the planning and reporting of food service programs.

**18. HEALTH AND SAFETY.**

Develops and implements a process for assessing potential safety hazards. Assists in the preparation of a district disaster preparedness and recovery plan.

**19. COMMUNITY RELATIONS.**

Prepares enrollment projections and financial information for meetings and elections. Effectively communicates financial and operational issues to the public. Represents the mission and goals of the district to the community.

**20. GENERAL ADMINISTRATION.**

Acts as advisor to the superintendent concerning financial affairs and matters of general importance to the educational program. Participates in decision-making and policy development.

**21. PROFESSIONAL DEVELOPMENT.**

Sets goals and participates in activities to maintain knowledge and skills and stay abreast of school finance related issues.

## Sample Two

# LEADERSHIP COMPETENCY EVALUATION

*This is intended as a sample. Choose the competencies specifically referenced in the job description of the employee.*

For each item, based on your knowledge of the performance of the employee, circle on the scale between 1 and 10. The scale is described below.

**Does Not Meet Expectations**    1   2   3   4   5   6   7   8   9   10    **Exceeds Expectations**

A comments section is included on the online form. Comments are encouraged but are required for any competency with a ranking below 5.

- 1. RESPECT.** Establishes and maintains a reputation of respect for the key stakeholders of the district.
- 2. FOLLOW THROUGH.** Follows through on all commitments and promises with an appropriate sense of urgency.
- 3. INNOVATION.** Values and actively encourages creative and innovative ideas from staff and key stakeholders. Anticipates and seizes new opportunities.
- 4. PRIORITIZING.** Manages time and resources effectively according to district and professional/ personal goals. When necessary, makes personal sacrifices to assure results.
- 5. DELEGATION.** Broadly shares both responsibility and accountability with individuals or groups based on their skills, experience, and available time. Clarifies roles amongst staff.
- 6. EXPRESSING IDEAS.** Writes clearly, concisely, and persuasively. Speaks in a clear and articulate manner, adapting content and style to different audiences and venues.
- 7. MAKING A CASE.** Appeals to emotions and/or reason using data, concrete examples and demonstrations when talking with board of education, community members and the media.
- 8. MEETINGS.** Effectively prepares for board of trustee meetings, including setting clear objectives, agendas, advance materials, and appropriate time management. Provides opportunities for input.
- 9. TRUST.** Gains the trust of all stakeholders by actively listening and seeking to understand their views and needs. Avoids bureaucratic responses.
- 10. INSIGHT.** Understands his/her strengths and weaknesses and circumstances in which they become most important.
- 11. SEEKING GROWTH.** Actively seeks constructive feedback and other opportunities for self-development. Takes responsibility for his/her own behavior, mistakes and results and learns from successes and failures.
- 12. CONFLICT.** Models appropriate responses to conflict, encouraging others to manage conflict openly and productively. Settles disputes fairly.
- 13. VISION, MISSION, VALUES AND GOALS.** Effectively establishes and articulates a compelling vision that aligns with the district's broader mission, vision, and values. Cascades these goals and values throughout the district.
- 14. NETWORKING.** Seeks opportunities to work with a wide range of individuals and organizations inside and outside of the district to achieve better outcomes.
- 15. MANAGING CHANGE.** Effectively manages change by setting new direction, seeking to understand the effects of change on the district and stakeholders.
- 16. RESILIENCE.** Demonstrates tenacity in the face of adversity, persevering through significant challenges to reach long and short-term goals.



*Sample Three*

**MODEL- District Clerk/School Business Manager Evaluation**

\_\_\_\_\_ School Year \_\_\_\_\_ Employee Name

\_\_\_\_\_ Years completed

**PURPOSE:**

This evaluation is being conducted to provide the District Clerk/School Business Manager with the School Board's assessment of his/her strengths and weaknesses relative to the performance as the District Clerk/Business Manager of School District #\_\_\_\_\_. It is the intent that this instrument will serve to provide the District Clerk/Business Manager with reinforcement of effective performance and to be used as a guide for change and/or improvement. Comments should include goals for future projects and performance.

**KEY TO THE RATING SCALE:**

Chose a rating based on applicable factors, such that the applicable factors, in general, most closely describe the District Clerk/School Business Manager's performance based on your observation.

0- Not applicable, no knowledge, or unable to evaluate

1- Performance does not meet job requirements, performance improvement plan required.

2- Performance is below average.

3- Performance is satisfactory.

4- Performance is above average or exceeds job requirements.

\* An explanatory comment should be provided when either option "1" or "2" is selected. Space has been provided accordingly.

**Board and Administration Relations**

Supports, interprets and enforces school district policy. Assumes leadership in implementation of the district's goals.

Not Known      0          1          2          3          4          Exceeds Standards

Publishes notices, attends and/or participates in all Board meetings, maintaining an accurate record of actions and participants, and provides timely publication of the minutes.

Not Known      0          1          2          3          4          Exceeds Standards

Keeps the Board of Trustees informed on issues, needs, and operations of the school system.

Not Known      0      1      2      3      4      Exceeds Standards

Offers professional advice to the Board of Trustees on items requiring Board action, making recommendations based on thorough analysis. Uses legal counsel when appropriate.

Not Known      0      1      2      3      4      Exceeds Standards

Collects information and assists the school administrator and the school board with contract negotiations.

Not Known      0      1      2      3      4      Exceeds Standards

Bases any position upon principle and maintains that position without regard for its popularity until an official position has been reached. Thereafter, the decision of the Board is supported, even if the decision may not conform to personal beliefs.

Not Known      0      1      2      3      4      Exceeds Standard

Assumes additional administrative responsibilities willingly.

Not Known      0      1      2      3      4      Exceeds Standards

Is willing to make decisions when appropriate, adapt to unusual situations effectively and creatively, and uses logical and reasonable thought processes.

Not Known      0      1      2      3      4      Exceeds Standards

Continues professional development through reading, coursework, conference attendance, and interaction with Business Managers/District Clerks from other Districts. Develops, uses, and evaluates effective approaches to improve job performance.

Not Known      0      1      2      3      4      Exceeds Standards

Represents the school district professionally in local, regional, state and national affiliation and participation.

Not Known      0      1      2      3      4      Exceeds Standards

Comments:

## Position Specific Responsibilities

Accurate in collection of monies, determines that funds are spent wisely and that adequate control and accounting procedures are maintained. Operates within State and District guidelines and procedures governing expenditures of funds for goods and services.

Not Known      0            1            2            3            4            Exceeds Standards

Reconciles cash accounts and reports to the Board monthly. Evaluates financial status and makes recommendations for adequate funding. Provides realistic estimates of financial requirements. Plans and reports on present and future needs. Demonstrates an ability to effect desirable budgetary changes.

Not Known      0            1            2            3            4            Exceeds Standards

Supervises the payroll function for the District including employee benefits, state and federal tax deposits, workmen's compensation insurance and other related activities.

Not Known      0            1            2            3            4            Exceeds Standards

Supervises human resource requirements for personnel including collective bargaining agreement adherence, state and federal labor laws, and does so with an assurance of accuracy and confidentiality.

Not Known      0            1            2            3            4            Exceeds Standards

Collaborates with school administrator to meet all Human Resource needs based on federal and state guidelines.

Not Known      0            1            2            3            4            Exceeds Standards

Collaborates with school administrator to actualize school vision and operationalize yearly initiatives.

Not Known      0            1            2            3            4            Exceeds Standards

Reviews, codes, and organizes payables so they are ready for approval at the monthly Board meeting. Monitors receivables and manages collection practices, when required.

Not Known      0            1            2            3            4            Exceeds Standards

Supervises vendor relations including maintenance contracts and bid requests.

Not Known      0            1            2            3            4            Exceeds Standards

Encourages personnel to care for school property and safeguards physical facilities. Monitors and manages major facility changes or improvements as needed.

Not Known      0            1            2            3            4            Exceeds Standards

Administers and conducts all school district elections as prescribed by law.

Not Known      0            1            2            3            4            Exceeds Standard

Completes an accurate Financial Summary to the Office of Public Instruction annually and participates openly and actively with all annual audit requirements.

Not Known      0            1            2            3            4            Exceeds Standards

Comments:

### **Staff and Community Responsibilities**

Models positive and professional attitude.

Not Known      0            1            2            3            4            Exceeds Standards

Creates conditions in the workplace that allows others to hold a professional pride and enthusiasm; encourages a collaborative spirit.

Not Known      0            1            2            3            4            Exceeds Standards

Adheres to school district guidelines concerning the use of facilities and equipment for community or school related activities.

Not Known      0            1            2            3            4            Exceeds Standards

Responds respectfully to the community and staff when problems are identified. Maintains composure when faced with unexpected challenges.

Not Known      0            1            2            3            4            Exceeds Standards

Celebrates staff members whose performance has been outstanding and acknowledges growth and effort.

Not Known      0            1            2            3            4            Exceeds Standards

Consults privately with those staff members whose performance is not acceptable.

Not Known      0          1          2          3          4          Exceeds Standards

Understands and respects students as individuals.

Not Known      0          1          2          3          4          Exceeds Standards

Comments:

Final Comments and Recommendations:

Evaluator Name: \_\_\_\_\_

Evaluator Signature: \_\_\_\_\_

Employee Comments:

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_





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