

SCHOOL BUSINESS OFFICIAL RELATIONS, DUTIES AND CODE OF ETHICS

**Montana Association
Of
School Business Officials**



[Page left intentionally blank]

Accuracy and Timeliness of Content: We believe the Content (as defined below) is obtained from reliable sources and we will endeavor to ensure that the Services are uninterrupted and that the Content is complete, accurate and timely. Nonetheless, the Content may contain errors or omissions, or the Services may experience interruption. WE DO NOT, NOR DO ANY OF OUR CONTENT PROVIDERS, WARRANT OR GUARANTEE ACCURACY, COMPLETENESS OR TIMELINESS OF THE SERVICES.

Table of Contents

- I. Community Relations 3
- II. Relations With School Board 3
- III. Relations With Administrators 3
- IV. Relations With Other Employees 4
- V. Relations With Pupils and Parents..... 4
- VI. Relations With Agents and Salesmen 4
- VII. Professional Relations 5
- VIII. Code of Ethics 5
- IX. Duties of The School Business Official..... 5-7
 - A. 20-3-321, Montana Codes Annotated
 - B. Difference of Clerk and Business Manager
 - C. What does the District need?
 - D. Who does the Clerk work for?
 - E. 20-3-325, Montana Codes Annotated
 - F. 20-9-213, Montana Codes Annotated
 - G. Who evaluates the Clerk?
- X. Sample- Business Manager Job Descriptions 8
- XI. Sample- District Clerk Job Descriptions 10

XII. Sample- Professional Appraisal 12

XIII. Clerk List 16

RELATIONS AND CODE OF ETHICS

COMMUNITY RELATIONS

The School Business Official:

- Shall take appropriate steps to keep the community accurately informed about pertinent school business matters.
- Shall recognize and seek to understand the needs of the community and relay such information to the Superintendent or Board.
- Shall consistently fill the role of school business leadership in the best interests of the school and community.
- Shall avoid the use of pupils, school personnel, or buildings in the promotion of partisan politics, commercial advertising, or personal gain.

RELATIONS WITH SCHOOL BOARD

The School Business Official:

- Shall not actively endorse, circulate, petition, or campaign in the election of candidates for the School Board.
- Shall honor contracts and agreements of employment (including job descriptions) made with the School Board until fulfilled or released.
- Shall see that the abilities, personal characteristics and qualifications of employees being supervised are not misrepresented.
- Shall not attempt to influence board members individually in any matter that affects the business official's professional welfare.
- Shall provide the Board with concise and meaningful financial and business operations data.
- Shall abide by policies of the School Board.

RELATIONS WITH ADMINISTRATORS

The School Business Official:

- Shall recognize requests for information and promptly exchange accurate and complete information pertinent to all employees of the school system or systems involved and make certain that all such information is kept confidential.
- Shall not indulge in irrepressible discussions or comments.
- Shall cooperate with others, keeping the welfare of the school district as the prime goal.
- Shall not engage in personal politics or power struggles to promote personal gain at the expense of others, or the welfare of the district.
- Shall never disclose confidential information about Administrators unless disclosure serves a compelling professional or legal purpose.

RELATIONS WITH OTHER EMPLOYEES

The School Business Official:

- Shall assume appropriate responsibility in the selection, assignment, and supervision of employees and contribute to their professional and occupational improvement.
- Shall see that basic contracts and supplemental duties are stated according to the statutes of the State of Montana.
- Shall see that all salaries offered are consistent with existing adopted salary schedules.
- Shall acknowledge the good performances and contributions of employees and refuse to accept accolades for the services or work of others.
- Shall not use the position to unduly influence or force employees to subscribe to the political causes.
- Shall not jeopardize the educational welfare of pupils in order to avoid an unpleasant staff relationship.
- Shall obey the local, state and national laws as the guidelines for action.
- Shall initiate procedures to recommend, secure, and retain the most competent and best-qualified employees under your supervision and to recommend for dismissal those who do not meet the standards of competency for qualified employees.
- Shall never disclose confidential information about colleagues unless disclosure serves a compelling professional or legal purpose.

RELATIONS WITH PUPILS AND PARENTS

The School Business Official:

- Shall recognize and maintain the dignity and worth of each individual when dealing with pupils, parents or legal guardians.
- Shall never disclose confidential information about pupils to other pupils, parents or legal guardians unless disclosure serves a compelling professional or legal purpose.

RELATIONS WITH AGENTS AND SALESMEN

The School Business Official:

- Shall not invade the privacy of pupils, teachers, and other employees by making personal information or name and address lists available to agents, salesmen or other commercial interests.
- Shall not obligate himself/herself or the school district through acceptance of individual gifts, or remuneration or personal discount, but shall award orders or contracts only on the basis of need and value.
- Shall not act as an agent or salesman for any item purchase by the school district.

PROFESSIONAL RELATIONS

The School Business Official:

- Shall show evidence of personal interest in the profession through continuous study and active participation in MASBO.
- Understands that each educational service association has a right and responsibility to retain its integrity as an individual entity. We also realize that all associations should work for a general concept of cooperation and communication for the advance of educational opportunity in Montana.
- Shall apply for a new position only when it is known to be vacant, when he or she is honestly interested in moving and shall present his/her qualifications honestly.
- Shall have endorsed the team management concept.
- Shall support the actions of a colleague whenever possible, never publicly criticizing or censuring the official.
- Shall offer assistance and/or guidance to a colleague when such help is requested or when need is obvious.
- Shall accept leadership roles and responsibilities when appropriate, but refrain from “taking over” any association.

CODE OF ETHICS

The School Business Official shall abide by laws pertaining to their position as listed in Montana Codes Annotated (MCA), Title II. (2-2-101 through 144)

DUTIES OF THE SCHOOL BUSINESS OFFICIAL

The mechanics of local school operations vary, as do the size and other physical characteristics of school districts. Business management tasks are performed by a variety of personnel and expertise, however, in small school systems, the Superintendent has the major responsibility in business administration with the District Clerk actually performing the tasks of various business functions. Studies reveal frustrations on the part of the Superintendent and District Clerks in small systems, due to the lack of adequate personnel, equipment and facilities, to meet the complexities of today’s business management requirements.

The Superintendent of Schools is considered the chief executive officer of the Board of Trustees and, thus, is responsible for directing and coordinating all administrative functions including business administration. Montana Statute provides that Boards of Trustees appoint a competent person to act as District Clerk and perform certain duties. This provision has raised the question of “to whom is the District Clerk directly responsible?” “To the Board or to the Superintendent?” The Montana Association of School Business Officials (MASBO) advocates that this issue be decided by the Board and noted in Board policy. It is important to the success of the school system to have a unified or team approach to administrative activities. Communication and understanding between the Board, the Superintendent and the person administering the school’s business affairs is essential. The school business manager, regardless of the actual title given the position, is a critical element to a good management team.

- 20-3-321, Montana Codes Annotated (MCA), states “the trustees shall employ and appoint a competent person, who is not a member of the trustees, as clerk of the district.” This appointment is made during the organization meeting to be held each year after elections and oaths of office have been completed.
- **What is the difference between a Clerk and Business Manager** – A Clerk takes and maintains board minutes, maintains the historical documents of the district and issues the warrants. A business manager is frequently given the latitude to make financial decisions on the day-to-day operations of the district. Each district is unique and needs to evaluate what it is that they need. Many districts have a combination Clerk/Business Manager and some of the larger districts employ two people to carry out the responsibilities. The essential thing is that the person or persons employed know what the job expectations are in writing. ***Samples of job descriptions for a Business Manager and a District Clerk have been included. These may assist you in developing your own job description.**
- **What does the district need** - Each district is unique. The Board of Trustees, the Superintendent and the Business Official map out the duties of the job and evaluate it for its reasonableness for one person to realistically do. What your district expects and what your neighboring district expects from the position can vary significantly.
- **Who does the Clerk work for** – MASBO advocates that this issue be decided by the Board and noted in Board Policy. The Clerk/Business Manager is in the unique position of maintaining a delicate balance between being directly accountable to the Board of Trustees while at the same time serving as financial consultant to the Superintendent. Clerks must recognize that the Superintendent, as the leader of the administrative team, serves as liaison between the Administrative team and the policy team. Basic to this relationship is the recognition that the Trustees, Superintendent and Clerk/Business Manager must have a clear understanding of each other’s role in order to operate effectively. Since the line between policy and administration is frequently unclear, teamwork is essential. MASBO recommends that the District Clerk and the Superintendent review the frequently performed functions listed in the Clerk/Business Manager Duties publication and each determine how he/she perceives the assignments.
- **20-3-325, MCA**, states the Clerk of the district” shall attend all meetings of the Trustees to keep an accurate and permanent record of all the proceedings of each meeting... The Clerk of the district also shall be the custodian of all documents, records, and reports of the Trustees. Unless the Trustees provide otherwise, the Clerk shall: (1) keep an accurate and detailed accounting record of all receipts and expenditures of the district in accordance with the financial administration provisions of this title; and (2) prepare the annual Trustee’s report required under the provisions of 20-9-213 MCA” The Clerk is

also the district's election administrator (13-1-101, MCA) and is responsible for all district election administration duties. Generally, many of the tasks listed in law that are specifically the Trustees' responsibility are delegated to the Clerk. The Trustees are responsible for all the following and the Trustees should make sure each is done in an appropriate and timely fashion.

- **20-9-213 MCA** mandates the Trustees to transact all fiscal business and execute all contracts in the name of the district. This section also states that the Trustees shall (1) cause the keeping of an accurate, detailed accounting of all receipts and expenditures of school money... (2) authorize all expenditures of district funds and cause warrants to be issued...; (3) issue the warrants as long as all budgeting laws are complied with...; (4) invest the money of the district...; (5) cause the district to record each transaction in the appropriate account.. In order to properly report the receipt, use, and disposition of all money and property for which the district is accountable; (6) report annually the financial activities of each fund maintained by the district; (7) whenever requested, report and other fiscal activities; (8) cause the accounting records to be audited; (9) perform ... other fiscal duties that are in the best interests of the district. The duties performed in getting the above mandated functions done satisfactorily are extensive and intricate and non-performance or incorrect performance could result in penalties on the district or the Trustees or both.
- **Who evaluates the Clerk** – This function should be consistent with whoever annually reviews the job description and the frequently performed functions list with the Clerk. For open communications, this needs to be done annually so there is no misunderstanding of what is expected. The Board should specify who does the evaluation and the Clerk should make sure it is noted in the Board minutes. In a lot of districts the duties as Clerk are evaluated by the Board and the duties as the Business Manager are evaluated by the Superintendent. ***A sample evaluation form has been provided that may help you in developing your own evaluation form.**

SAMPLE

Position Title: **Business Manager**
Department: **District-wide**
Reports to: **Superintendent and Board of Trustees**

JOB SUMMARY: Supervises the management of the financial affairs of the District.

ESSENTIAL DUTIES and RESPONSIBILITIES. *Other duties may be assigned.*

1. Invest monies of the district with board approval in accordance with School Laws of Montana, 20-9-13(4).
2. Acts as an advisor to the Superintendent on all questions relating to the business and financial affairs of the District.
3. Helps to prepare and administer the annual budget.
4. Be responsible to see that detailed accounting of all receipts and expenditures for the extracurricular funds is made.
5. Hires, assigns, supervises and evaluates personnel in the offices under her/his jurisdiction.
6. Performs such other duties and assumes such other responsibilities as the Superintendent may from time to time assign.
7. Supervises all accounting operations
8. Supervises the payroll functions of the District.
9. Administers a budget control system for the District.
10. Acts as an advisor to the Superintendent and Board on all questions relating to the business and financial affairs of the district.
11. Arranges for internal auditing of school accounts and maintains an internal auditing program.
12. Provides monthly accounting of all income and expenditures to the Superintendent and Board.
13. Provides and analyzes all financial statements.
14. Prepares reports to the proper staff officials concerning the status of their budgetary accounts to guard against the overspending of any budgeted account.

SAMPLE

Business Manager

1. Approves in coordination with the Superintendent all vouchers authorizing the expenditure of monies
2. Recommends new accounting methods as desirable and necessary.
3. Obtains and studies comparative prices and quotes so as to ensure quality purchasing by the District.
- 4 Oversees the maintenance of accounting equipment.
5. Cooperates with the auditors and provides information to them as requested.
6. Supervises the deposit of all revenue collected and renders a monthly report to the County Treasurer of the receipt during the preceding month.
7. Maintains separate accounts for the activity fund, food service fund, scholarship funds and others established by the Board.
8. Manages the business services of the school district.
9. Make recommendations for employment, dismissals and suspensions of all personnel in the department.
10. Monitors internal control activities for auditing purposes.
11. Coordinates all insurance programs.
12. Directs and supervises the fixed asset accounting procedure.
13. Implements and monitors purchasing policies and procedures.
14. Prepares and distributes all necessary forms to budget managers for their use in budget preparation.
15. Prepares final budget documents for the Superintendent and Board of Trustees approval.
16. Attends workshops to keep current with audit changes, accounting changes, Federal Laws, Montana School Laws, etc.

SAMPLE

Position Title: **District Clerk**
Department: **District-wide**
Reports to: **Superintendent and Board of Trustees**

JOB SUMMARY: Oversees budget and tax matters. Prepares and publishes bid specifications. Conducts annual school elections. Assumes duties as Clerk of the Board.

ESSENTIAL DUTIES and RESPONSIBILITIES. *Other duties may be assigned.*

1. Coordinate Summer Foods application and related paperwork.
2. Reviews the Annual Trustees report under the provisions of 20-9-213(5).
3. Report annually to the County Superintendent, not later than August 1, 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 Superintendent of Public Instruction.
4. Oversee tuition provisions.
5. Approves in coordination with the Superintendent all vouchers authorizing the expenditure of monies.
6. Maintain confidential reports for principals.
7. Updates master agreement.
8. Prepares and publishes all bid specifications required by law.
9. Provides building secretary assistance.
10. Records and transcribes all Board of Trustee meetings, maintaining an accurate and permanent record of the proceedings of each meeting.
11. Oversees Workman's Comp reports for injured employees.
12. Oversees hiring procedures.
13. Assumes responsibility for any other duties as Clerk of the Board as prescribed by law or assigned by the Board of Trustees.
14. Receipts various district related moneys, such as lunch collections, health insurance payments, building use fees, refunds, etc., and student activity receipts/disbursements.

SAMPLE

District Clerk

1. Participates in Public Relations efforts.
2. Responsible for all elections – BOND ELECTIONS, TRUSTEE ELECTIONS, SPECIAL LEVY ELECTIONS, BUILDING RESERVE ELECTION.
3. Cooperates with the auditors and provides information to them as requested (District funds, federal funds).
4. Oversees student profile efforts.
5. Prepares together with the Superintendent and the Chair of the Board an agenda setting forth all known items of business to be considered at the meeting and delivers the agenda to each member at least two days prior to meeting.
6. Oversees microfilming efforts.
7. Attend workshops to keep current with audit changes, accounting changes, Federal Laws, Montana School Laws, etc.
8. Obtains, organizes and gathers pertinent data as needed, and puts it in usable form including issuance of contracts.
9. Keep current and maintain index of official board book.
10. Prepare administrators and certified personnel contracts – maintain contract information, placement level, leave f absence, sabbatical leave, tenure, retirement and early retirement information.
11. Prepare salary schedules for personnel working under negotiated contracts.
12. Keep current – notary license and bond; receive acknowledgment of deeds mortgages and other instruments in writing.
13. Oversee enrollment/attendance information and reports to include ADA and ADM from form submitted by all schools to provide concise and condensed and accurate numbers, maintain file of enrollment and promotion reports from schools.
14. Maintain tuition record including out of state, requests for waiver of tuition, payment of out of district and out of state tuition fees.
15. Compile and update bus routes.
16. Collect all monies due to the Board.

SAMPLE

PROFESSIONAL APPRAISAL – BUSINESS MANAGER/DISTRICT CLERK

Name _____ Date _____

Position _____

Years of Experience _____

Years of Experience in System _____

Evaluation Key: 0 Not possible to evaluate

- 1 Weak
- 2 Fair
- 3 Good
- 4 Excellent
- 5 Outstanding

This form has been developed as part of a continuous improvement program for all administrators and supervisory personnel. It is intended that the use of it be a professional growth experience for all persons involved. Emphasis is to be placed upon self-evaluation on the part of each individual.

PERSONAL RESPONSIBILITIES

Evaluator

- | | |
|--|-------------|
| 1. Accepts administrative decisions and works enthusiastically toward achieving goals even though they may not conform to personal opinions. | 0 1 2 3 4 5 |
| 2. Takes advantage of opportunities for professional growth that are available beyond the requirements of the District? | 0 1 2 3 4 5 |
| 3. Belongs to professional organization in his field. | 0 1 2 3 4 5 |

COMMENTS:

Administrative and Professional Responsibilities

Evaluator

4	Organizes staff for maximum efficiency and effectiveness	0 1 2 3 4 5
4.	Assumes the leadership for the overall morale of the building or department.	0 1 2 3 4 5
6.	Supports, interprets and enforces the school district policy in area of his/her responsibility	0 1 2 3 4 5
7.	Is willing to make decisions which may be unpopular, yet be best for the overall program	0 1 2 3 4 5
8.	Reports and proposals to supervisors are accurate, complete and objective - the type that can be relied upon	0 1 2 3 4 5
9.	Maintains adequate reports and records, and interprets them to the greatest extent of their value	0 1 2 3 4 5
10.	Communicates pertinent information to the board and administration	0 1 2 3 4 5
11.	Willingly gives of his/her service beyond minimum requirements to school district activities	0 1 2 3 4 5
12.	Exerts leadership and assists in developing philosophy, policy and curriculum as school or program operates within the framework of the district	0 1 2 3 4 5

COMMENTS:

Staff Relationships

Evaluator

- | | | |
|-----|---|-------------|
| 13. | Regards the staff with respect due professionals | 0 1 2 3 4 5 |
| 14. | Staff feels free to approach me on any matters of concern | 0 1 2 3 4 5 |
| 15. | Praises in general and in particular those departments and staff members whose performance has been outstanding | 0 1 2 3 4 5 |
| 16. | Consults privately with those staff members whose performance is not acceptable | 0 1 2 3 4 5 |
| 17. | Uses discretion and consideration in speaking of school/district and colleagues | 0 1 2 3 4 5 |

COMMENTS:

Administrator and Student Relationships

- | | | |
|-----|--|-------------|
| 18. | Understands and respects students as individuals | 0 1 2 3 4 5 |
|-----|--|-------------|

COMMENTS:

Community Responsibilities

Evaluator

- | | | |
|-----|---|-------------|
| 19. | Promotes constructive relationships between the school/district and the community | 0 1 2 3 4 5 |
| 20. | Constructively interprets the school program and the policies to the community | 0 1 2 3 4 5 |
| 21. | Encourages good professional ethics in others | 0 1 2 3 4 5 |

COMMENTS:

How can the District provide you with a higher degree of support and leadership in your role?

SUMMARY:

RECOMMENDATION:

Date

Signature

Date

Signature of Immediate Supervisor

The following list is intended to serve as an employment and communication tool. The district clerk should review this with the district superintendent and board chair each year following the organizational meeting in May. This list is not conclusive and many other duties may be added. Upon completion of the duty inventory, there should be no misunderstanding of who is expected to do which duty. This list can be incorporated into various job descriptions.

Board Meetings	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Attend all Board meetings					20-3-321, MCA
2. Record the minutes of all meetings and transactions					20-3-321, MCA
3. Notify Trustees of meetings					
4. Provide orientation of new Trustees					
5. Develop the Board agenda					
6. Distribute Board agenda					
7. Provide appropriate data for agenda					
8. Provide minutes for media					
9. Inform staff of Board procedures					
10. Provide notice for all meetings of the board including committee meetings					
11. Schedule budget hearing					
Policies of the Board	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Advise on financial and budgetary policies					
2. Evaluate business related policies					
3. Maintain policy manual					
4. Annual review of policy manual					
Accounting Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Maintain records of all funds as required by law					
2. Maintain records of all receipts and disbursements					
3. Write warrants for all approved claims					
4. Co-sign all operating fund checks					20-9-221, MCA
5. Prepare claims					
6. Prepare payroll					
7. Deposit funds					

8. Maintain records of student activity funds					
9. Sign student activity fund checks					
10. Reconcile County Treasurer statements and bank statements					
11. Maintain records of all Grant funds					
12. Recommend accounting systems and equipment					
13. Recommend personnel for accounting					
14. Apply for Grants					
15. Encumber expenditures & liabilities					
16. Reconcile Fund 15 Misc. Programs					
17. Reconcile Student Activity Fund					
Technology	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recommend systems and programs for business functions					
2. Prepare forms for use by system					
3. Operate system for payroll					
4. Operate system for accounts payable					
5. Operate system for fund accounting					
6. Operate system for inventory & update annually					
Pupil Accounting	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Maintain permanent record of all students					
2. Maintain register of all pupil attendance					
3. Complete enrollment reports					
4. AIM Reporting					
Auditing	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Perform pre-audits or internal auditing procedures					
2. Perform post-audits responsibilities					
a. Respond to audits recommendations					
3. Recommend required audits to schedule					

Cash Management and Debt Service	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recommend investment of funds					
2. Notify County Treasurer of investments					
3. Maintain Bond and Note register					
4. Maintain register of Bond maturities and debt payments					
5. Budget for debt service payments					
6. Provide for payment of principal and interest					
7. Maintain petty cash and stamps					
Financial Planning	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Prepare budget					
2. Provide financial information for budget preparation					
3. Provide receipt estimates - must be knowledgeable in tax levies and other resources					
4. Monitor the budget - notify budget directors and trustees of budget balances, etc.					
5. Maintain fiscal relationships with other governmental entities					
6. Prepare financial and statistical reports for administration and school board					
Personnel Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recruit personnel for positions in business functions					
2. Maintain permanent records of all district employees					
3. Provide information relative to working conditions, benefits, policy and procedures					
4. Maintain records of sick leave, vacation, leaves of absence, etc.					
5. Maintain individual earnings records and payroll withholding records					
6. Maintain personnel files following guidelines					
7. Maintain records of teacher certification					
8. Obtain substitutes and part-time employees as needed					
9. Co-sign personnel contracts					
10. Provide for in-service training					

11. Staff evaluations					
12. Filing of evaluations					
13. Process Worker's Comp. issues					
14. Process Unemployment issues					
Purchasing and Supply Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Serve as purchasing agent for district					
2. Develop specifications for supplies and equipment					
3. Call for bids per legal requirements					
4. Provide purchase order forms					
5. Maintain central stores					
6. Approve purchase orders to determine budget authorization					
7. Develop purchase order procedures					
8. Organize staff committees to develop specifications and standards					
9. Dispense general supplies					
10. Maintain warehousing, receiving, storage and delivery services					
11. Conducts and maintains inventory records and fixed assets					
12. Deal with vendors					
Facility Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Maintain records of leases, rights-of-way and easements					
2. Manage rental of school owned facilities, gyms, classrooms, etc.					
3. Collect fees for rentals					
4. Notify appropriate school personnel of building use					
5. Manage auditorium stage crews					
6. Maintain record of after-school use of buildings					
7. Develop procedures for use of buildings, rental fees, etc.					
8. Recommend and manage disposal of obsolete equipment					

Risk Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Determine insurable values of building and contents					
2. Recommend policies for casualty, liability, fidelity and school indemnity					
3. Maintain register of all insurance policies					
4. Call for bids or negotiate with insuring agencies					
5. File loss claims and accident reports					
6. Arrange for facilities and equipment safety inspections					
7. Maintain records for facilities and equipment safety inspections					
8. Safety Committee (Safety Culture Act)					39-71-15xx, MCA
9. Inform public requesting use of school facilities of insurance limitation					
10. Respond to claims against school					
11. Office emergency preparedness					
12. Chain of command for emergencies					
Food Service Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recommend policies and procedures					
2. Maintain records					
3. Sell lunch tickets					
4. Provide for fund collections					
5. File reports with state agency					
6. Provide cost analysis					
7. Provide for in-service training					
8. Purchase supplies and equipment					
Pupil Transportation	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recommend policies and procedures for home to school transportation					
2. Recommend policies and procedures for activity transportation					
3. Prepare individual transportation contracts					

4. Supervise bus maintenance					
5. Develop bus routes and schedules					
6. Negotiate contracted bus service					
7. Recruit personnel					
8. Provide for maintenance and inspections					
9. Provide for driver in-service training (10 hour training rule)					OPI Trans
a. Keep training documentation					
10. Collect fees (if applicable)					
11. Complete and file reports to state agencies					
12. Oversee compliance with drug testing mandates					
13. Bus scheduling					
Operation and Maintenance of Physical Plants	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Recommend maintenance policies and standards					
2. Schedule and allocate funds and personnel					
3. Recommend replacement and remodeling					
4. Inspect and evaluate services					
5. Recruit personnel					
6. Provide for in-service training					
7. Maintain record of utilities					
8. Maintain record of construction					
9. Negotiate with contractors and engineering services					
10. Maintain current Material Safety Data Sheets (MSDS)					
Negotiations	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Serve on management team when needed					
2. Prepare pertinent fiscal data for management team					
3. Record minutes of negotiation sessions as needed					
4. Shares proper information with employee unit					

Elections	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Be election administrator or designate an election administrator					13-1-101, MCA
2. Post notices of election					
3. Prepare ballots for elections					
4. Notify cert. election judges & clerks					
5. Compiles information to provide for certification of election returns					
6. Provide supplies for elections					
7. Provide financial information for levy and bond elections					
8. Publish notice of Trustee election					
9. Follow election law using Election Handbook guidelines (due to the numerous duties for the election process)					13-1-101, MCA
10. Appoint assistant election administrator if needed					MASBO Election Manual
11. Do the resolution to call the election					
Records Retention	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Provide security and preservation of records and documents					
2. Maintain storage files (according to Records Retention Schedule)					20-3-325, MCA
3. Recommend disposal of records					
4. Prepare required legal advertisements & public notices					
5. Comply with laws regarding records disposal					
Public Relations	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Assist the trustees in interpreting presenting and planning school financial programs					
2. Prepare materials for distribution					
3. Release information to press, radio & other media					

4. Address civic organizations, parent, faculty, and employee groups					
5. Recommend written policy for process in communicating with the media					
Office Management	Clerk	Clerk/Supt Team	Supt.	Other/Name	Comments
1. Supervise clerical and accounting staff in business office					
2. Recruit staff					
3. Provide for in-service training					
4. Coordinate central business office with clerical staff in other departments or buildings					
5. Establish procedures for record keeping					
6. Purchase supplies and equipment within budgetary allocation					
7. Provide for security of records					