

**Yaak School District Position Description
District Clerk/Business Manager**

Position Title: District Clerk/Business Manager

Department: District Office

Reports To: Board of Trustees

Prepared By: Board of Trustees Date:

Approved By: Board of Trustees Date:

SUMMARY:

In concert with the Yaak School Board of Trustees, the District Clerk/Business Manager shall possess the skills and provide efficient operation of the School District's business office to allow the smooth operation of the district's educational programs. The District Clerk/Business Manager will direct and manage all financial management, budget, general accounting, payroll, accounts payable, financial reporting, and grant management activities and practices for the district. This individual will perform long and short-range planning, oversee special projects, coordinate bond and mill levy elections, etc. In addition, this individual will also serve the Yaak School Board of Trustees as the Clerk and Elections Official.

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

Finance and Budgets

- Plans, develops, implements, and evaluates annual operating budgets including monitoring reports.
- Responsible for all facets of budgeting, accounting, payroll, investments, and accounts payable.
- Interacts with the superintendent in providing information for monitoring reports and record keeping.
- Communicate with stakeholders regarding budgets, staffing, expenditures, and other financial data.
- Responsible for ensuring the assets of the district are properly safeguarded, managed and accounted for.
- Responsible for managing the recording of all financial transactions within the district to include payroll, accounts payable, investment of district financial assets and oversight of all cash management activities.
- Prepares certified budget as well as line-item budget reports.
- Responsible for the preparation of all financial statements, reporting and projection of balances and other necessary reports for submission to the school Board of Trustees, and other regulatory and advisory agencies.
- Responsible for the planning and management of District budgeting functions to include the annual budget for all District funds.
- Manage, coordinate, develop and submit the district's annual budgets, for all budgeted funds.
- Manage and analyze District budget data to ensure informed decision making.
- Responsible for initiating and implementing sound budgetary practices to manage and direct all budgeting functions of the district.

- Responsible for directing the budget practices and policies of the district to ensure that all financial records are maintained in accordance with Board of Education policies and federal, state and local laws or regulations.

Human Resources and Payroll

- Responsible for all HR related duties. Management of Personnel records.
- Responsible for the processing of annual W-2's for both current and previous employees including specific functions attributable to this function.
- Responsible for processing retirements.
- Develops personnel forms and job descriptions for classified and certified staff.
- Coordinates hiring process procedures in conjunction with the Board of Trustees.
- Oversees maintenance of accurate and complete personnel records. Ensures that rules concerning confidentiality and retention are followed.
- Keeps abreast of legislation affecting human resources; trains management and monitors policies to ensure compliance.
- Responsible for tracking staff absences and leaves.
- Preparing, processing, and recording of specialized payroll and benefits transactions related to workers' compensation, TRS/PERS contributions, retroactive pay, and other related services.
- Responsible for managing the employee benefit administration, vendor relationships, and plan design, and employee benefits orientation, including the district self-insurance program (if applicable) for medical/dental, workers compensation, life and disability insurance.
- Make recommendations for enhancement and/or changes to employee benefit package based on cost, employee preferences, system capabilities, and strategic direction.
- Develop, recommend, and implement changes in administration of employee benefits and strategy planning for benefit plans, as needed.
- Manage open enrollment process by creating and implementing a project plan, delegating tasks, and creating open enrollment documentation and employee communication materials.
- Manage the district insurance program related to property, worker compensation, liability, district-owned vehicles, and employee health benefit programs.
- Responsible for payroll to include, but not limited to: (1) processing the monthly payroll; (2) preparing and submitting appropriate taxes and reports in an accurate and timely basis; (3) resolving payroll issues and concerns.
- Maintains up-to-date personnel files. Files all payroll information and draft employment contracts. Responsible for employment forms, including but not limited to retirement, W-4, I-90, MT New Hire, and background check processing.
- Enter payroll data from timesheets for all School District employees in preparation for posting and processing of P/R.
- Prepare all insurance claims, review/recommend annual liability and property insurance, and review/recommend annual employee's health insurance plan.

General Administration

Prepare for monthly Board Meetings agenda, minutes, expenditure list, monthly budget report, report monthly balance to the Treasurer financials, publicly notice meetings, prepare board books, and attends all meetings.

- Maintains and oversees district contracts with vendors.
- Performs duties of Secretary/Treasurer to the Board.
- Prepare and submit, in an accurate, complete and timely manner, all reports for the Montana Office of Public Instruction.
- Apply annually for State Grants offered through OPI's E-Grants System.
- Maintain a commitment to ongoing professional development.
- Maintains appropriate confidentiality.
- Prepare (with teacher) student enrollment reports and Annual Data Collection reports, maintain AIM/Infinite Campus Student Reporting System, prepare individual transportation contracts, and create reimbursement claims (TR5). Prepare student attendance/transportation agreements (when applicable) Maintain records of Teacher's yearly PIR (Pupil Instruction Related) days and Student attendance records.
- Prepare District portion of annual CSIP report in MAEFAIRS with assistance of the Head Teacher.
- Draft, maintain, and update the school's Policy Handbook, perform MCA policy research (Montana Code Annotated – school laws), suggest new policies and procedures.
- Purchase supplies and equipment, when applicable. Update/review inventory and fixed asset records (inventory tasks assigned by the board)
- Performs a wide variety of clerical and secretarial work, including typing, proofreading, filing, and checking and recording information.
- Serves as receptionist and gives information or directs visitors.
- Answers inquiries concerning standardized policies, procedures, and regulations.
- Receives, sorts, and distributes mail and office correspondence.
- Screens and forwards emails to appropriate staff or trustees.

QUALIFICATION REQUIREMENTS: *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's degree in finance, accounting, and/or a related field required. Minimum of three years' experience in school business office administration, finance, accounting, or related field. Payroll processing experience required, preferably in the public sector. Any equivalent combination of related experience and/or training; or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS:

As needed and as requested by the district.

LANGUAGE SKILLS:

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence.

Ability to speak effectively to employees of the organization. Computer and typing skills are required.

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 graphs.

REASONING ABILITY:

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to use critical and strategic thinking and problem-solving skills. Ability to deal with problems involving several concrete variables in standardized situations. Ability to evaluate written materials.

OTHER SKILLS and ABILITIES:

Time management skills and self-motivation. Ability to multi-task and communicate, interact, and work effectively and cooperatively with people from diverse ethnic and educational backgrounds in such a fashion as to establish and maintain effective working relationships with students, staff, school community, and the general public. Possess proven financial management skills. Ability to perform duties with awareness of all district requirements and Board of Trustees' policies, procedures, and practices. Works well under pressure imposed by timelines.

PHYSICAL DEMANDS:

The physical demands described here 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. While performing the duties of this job, the employee is regularly required to stand; walk; sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. Specific vision abilities required by this job include close vision, peripheral vision, and ability to adjust focus. Work involves sitting for extended periods of time. Verbal communicative ability may be required of public contact positions.

WORK ENVIRONMENT:

Work is performed indoors - in an office environment. Contact with employees, students, and public. The noise level in the work environment is usually moderate.

The information contained in this job description is for compliance with the Americans with Disabilities Act (A.D.A.) and is not an exhaustive list of the duties performed for this position. The individual currently holding this position performs additional duties and additional duties may be assigned.