

Browning Public Schools
Board Agenda Request
 Meeting To Be Held: March 26, 2025



- Recognition:** Students Staff Parents
- Information:** Building Report Old Business Superintendent's Report
- Action:** Resignations Hiring Contract Service Agreements
- Travel Out-of-State Travel In State Approvals
- Termination Legal Matters Other:
- This action request pertains to Elementary (only) High School/District Wide

Date: 03/18/25

To: Rebecca Rappold
 Superintendent of Schools

From: Bev Sinclair

Title: Director of Human Resources

Subject: Revise Finance Director/District Clerk Job Description

Description: Attached job description has been updated to meet requirements of STARS Act.

Financial Impact: N/A

Funding Source (Budget/grant, etc.): N/A

Funding Source: Salaries, benefits, and payroll costs to be charged against budgets for respective building/department/program/grant as applicable.

Attachment(s): Job Description

Superintendent Action: Approved Denied Deferred Initial & date: _____

Comments: _____

Board Action: N/A (Info) Approved Denied Tabled: _____

Browning Public Schools
JOB DESCRIPTION
Revised 3/26/25

Director of Finance/District Clerk

Summary of Functions

Manages, administers, and supervises the financial affairs of the school district. Provides leadership, direction and control of the financial, accounting and budgeting systems. ~~Serves as chief financial officer to the superintendent.~~ Serves as Director of Finance to the Superintendent. Serves as District Clerk of the school district in accordance with state laws and regulations.

Essential Duties and Responsibilities

A. Administrative Functions

- 1) Management. Manages, administers, and supervises the financial affairs of the school district in compliance with prevailing (1) accounting and auditing principles and standards; (2) federal and state regulatory and grant requirements; (3) district policies and procedures; (4) accepted business customs and practices; and (4) computer and other technologies essential in carrying out the foregoing. Establishes financial operational goals and objectives for business operations, and monitors such operations and activities to ensure that district business practices generally conform to and meet such goals and objectives. Plans, directs, and monitors operations of the Finance Department. Oversees the following tasks: the processing of payroll, including the preparation of payroll checks for all District personnel; the maintenance of up-to-date files of all payroll information; the processing of all authorized invoices; the maintenance of records of paid/unpaid invoices and purchase orders; the processing and maintenance of employment forms related to state and federal taxes and retirement systems; the communications and responses to requests from governmental agencies, labor organizations, and TRS and PERS, to provide information.
- 2) Planning. Plans and coordinates the district's immediate and long-term financial strategies based upon instructional and operational goals or objectives planned or recommended by the superintendent or adopted by the board.
- 3) Consulting. Serves as financial and business consultant to the board, the superintendent, and administrators as necessary. Obtains, researches and analyses relevant information and prepares related reports in recommending courses of action. Advises the Board of Trustees on financial and operational constraints as outlined by law.
- 4) Cooperation. Works effectively and maintains good relationships with superintendent, administrators, staff, and other district personnel in carrying out departmental and district goals and objectives. Provides assistance as needed.

- 5) Meetings. Participates in a variety of regularly-scheduled and impromptu meetings. Attends all meetings of the board of trustees.
- 6) Public Relations. Establishes and maintains good relationships with vendors, suppliers, contractors, governmental agencies, students, parents, and the public.
- 7) Reports. Prepares and submits ~~monthly reports on the District's financial status to the superintendent.~~ reports to the Board and Superintendent as requested; including monthly reports on the district's financial status to the superintendent. Assists in the preparation of state accreditation reports.
- 8) Supervision. Plans, assigns and monitors the work of the staff of the Finance Department. Determines staffing needs, aligns functional work areas and assigns responsibilities. Participates in the selection of new staff. Trains or supervises the training and development of staff. Evaluates, counsels and advises staff. Resolves or responds to grievances.
- 9) Training. Attends professional development courses in school and governmental accounting, computer technology, and other relevant courses. Provides training to administrators, secretaries, and department staff in performing the functions necessary to the work of the Finance Department.
- 10) Legislation. Analyzes proposed and enacted legislation in terms of short and long-range impact on the district's financial condition. Active in legislative process.
- 11) Other. Performs such other functions and assumes such other responsibilities as the Superintendent may from time to time assign or delegate.

B. Financial Functions

- 1) Accounting. ~~Oversees and controls all aspects of the accounting functions of the district including extracurricular activities.~~ Maintains accurate and detailed accounting records (e.g., receipts and disbursements) of all financial transactions of the district, serving as a liaison during any financial and labor audits, as required. Oversees and controls all aspects of the accounting functions of the district including extracurricular activities. Upgrades the general ledger coding system as necessary, conducts related training, and determines that transactions are properly coded. Maintains balanced accounts for each fund, examines general ledger trial balances by fund, and prepares adjusting entries on a monthly basis. Provides interim financial statements to the Superintendent on a calendar-quarter basis and other accounting reports as required. Performs fiscal year-end procedures including closing entries.
- 2) Audit. Before the fiscal year-end, meets with auditors to review and prepare for the upcoming audit. Oversees and directs procedures for assembling audit information and documentation in a timely manner in anticipation of the annual audit. Following fiscal year-end, provides adjusted trial balance by fund and related supporting schedules, information and detail to the auditors for the annual audit. Provides assistance to auditors as necessary to avoid delays and to mitigate audit costs. Performs internal audits of accounts on a periodic random basis or when circumstances indicate irregularities may exist.
- 3) Budgeting. 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; develops budget guidelines and assists with budget preparation by coordinating preparation of the District budget based upon planned financial strategies.

Complies and presents financial projections for revenue, expenditures, cash balances, and unreserved balances for budgeted and non-budgeted funds. Oversees current budget to determine that revenues are received and expenditures are disbursed according to the adopted budget. Institutes budget controls on schools, programs, grants, and central services as necessary to prevent administrators from exceeding budget spending limits. Evaluates requests for budget amendments, obtains appropriate approval for such changes, and adjusts budget accounts accordingly. Provides budget to actual comparison reports on a monthly or as-needed basis to the Superintendent and administrators. Arranges for the publication and distribution of budgets approved by the board of trustees.

- 4) Cash. Plans, develops, and maintains control over all district cash balances, receipts, and disbursements. Directs the collection, safekeeping and accounting over cash receipts. Supervises and oversees all aspects of cash disbursements. Performs fund transfers and reconciles cash with the county treasurer and all district bank accounts on a monthly basis, and takes affirmative steps to resolve permanent differences. Provides cash flow projection reports on a calendar-quarter or as-needed basis to the Superintendent.
- 5) Compliance. Assesses compliance with GASB and FASB bulletins and pronouncements, federal and state laws and regulations, and district policies and procedures and makes recommendations to the superintendent for necessary changes and implementation.
- 6) Computer System. Consults with accounting software supplier in maintaining and upgrading centralized accounting system. Acquires operational skills in using and understanding the system and its component parts. Assigns and maintains user security levels. Investigates and evaluates proposed upgrades or replacements.
- 7) Grants. Oversees administration of grants to ensure compliance with requirements, submits pay requests, disburses funds, performs grant accounting, and files required financial reports.
- 8) Insurance. Manages and administers all insurance policies and coverage of the district including automobile, general liability, property, errors and omissions, employee group health, student activities, and workers' compensation. Consults with insurance agent(s) in effecting changes in coverage or carriers. Prepares and advertises requests for proposals, evaluates and negotiates proposals, and makes recommendations.
- 9) Personnel. Oversees and directs accounting for leaves of absence by personnel and provides reports to superintendent as required. Monitors Family Medical Leave Act. Assists in collective bargaining negotiations and projects financial impacts of proposed changes.
- 10) Policies and Procedures. Periodically reviews adopted District policies and procedures relating to financial responsibilities of the department. Proposes new policies or revision of existing policies to the Superintendent. Revises and issues procedures as necessary to carry out the responsibilities of the department.
- 11) Property. Manages the District's real estate program and executes related deeds, contracts, agreements, trust indentures, etc. Oversees and directs the internal control system for all of the District's property of value established by board policy including buildings, land, vehicles, major equipment, and technology. Determines that such controls are in place and adhered to by those who are responsible for such property. Such controls include tracking movements, acquisitions, dispositions, updating inventory records, and making appropriate accounting entries. Determines that damage, deterioration or losses of property are properly reported and investigated in a timely manner. Provides assistance in long-range facilities planning and

develops related financial information. Works closely with Director of Facilities in administering new construction, major renovation or repair projects and ensures that contractor payment requests are authorized according to contract.

- 12) Purchasing. Evaluates purchase requests and approves all purchase orders of the District. Ensures that purchase order system is adhered to and that vendors, suppliers, and contractors understand and comply with those requirements in granting credit to the District. Determines that invoices submitted for payment are documented by approved purchase orders, receiving or packing slips and that credit memos are deducted from current payments due. Advises administrators in reducing costs through efficiencies in operations, volume buying and bargain sales. Negotiates with vendors for district-wide pricing as appropriate.
- 13) Student Counts. Oversees student counts for various revenue related purposes and determines such counts are accurate and properly reported. Oversees student registration.

C. District Clerk

- 1) General. Performs all functions of district clerk as provided by state law, rules, and regulations.
- 2) Policies. Assists the Trustees in ensuring all District policies comply with local, state, and federal laws.
- 3) Meetings. Attends Trustees' meetings and ensures that a permanent record is maintained as required by law, and, if unable to attend, ensures a qualified designee maintains an accurate permanent record. Keeps and maintains accurate minutes of meetings of the Board of Trustees. Prepares and provides Board packets to the Trustees prior to every Board meeting and makes the Board packets available to the public. In Board Secretary's absence, prepares all notices for Board meetings and elections.
- 4) Board Action. Oversees delegated responsibilities, such as board meeting minutes, to ensure compliance with requirements, and signs documents as District Clerk.
- 5) Elections. Serves as the election administrator for the District (unless the county administers an election at the request of the district); plans, organizes, and oversees all aspects of the annual election of the Board of Trustees and levy referendums.
- 6) Reports and Custodial Responsibilities. Acts as custodian of all documents, records, and reports of the Trustees, including the **Trustees' Report** required under § 20-9-213, MCA. Prepares and files the annual Trustees' Report. Acts as custodian of all other records and documents of the District; including but not limited to personnel files, student records, financial records, property records and meeting minutes.
- 7) Budgeted Funds. Monitors budgeted funds, determines revenue entitlements and cost reimbursements, oversees execution of related contracts and payment requests, prepares mill levy referendums for board approval, reports on sources of revenues and related impacts upon local taxpayers, and recommends fund transfers and end-of year reserves for approval. Draws and countersigns all warrants for expenditures.
- 8) Other. Assumes, oversees and performs financial responsibilities of the Board of Trustees on its behalf.

Organizational Relationships

Supervised by and reports to the Superintendent or designee. ~~Supervises four accounting clerks and one administration receptionist.~~ Supervises staff of the Business Office and one administration receptionist.

Qualifications

Education/Experience – Any combination of education and experience that would provide the required skill and knowledge for successful performance would be qualifying. However, applicants must meet the following minimum qualifications:

- Bachelor's Degree or higher in accounting, finance, business economics or closely related field.
- Five (5) years or more demonstrated familiarity with Montana school funding, federal school funding and school finance. Experience managing multimillion dollar budget.
- Experienced in using centralized computer accounting systems for general ledger, accounts payable, payroll, and budgeting functions.
- Proficient with desktop preferably Microsoft Operating System, Word, and Excel computers (preferably Microsoft operating system) and Office Suite applications; specifically, Word and Excel. Proficient with standard office equipment; including copier, telephone, and fax machine.
- ~~Valid driver's license.~~
- Experienced in financial analysis, modeling and presentations utilizing spreadsheets and other computer applications
- Demonstrated ability to motivate and supervise staff in achieving goals and objectives within established timelines
- Excellent communication skills; verbal and written. Ability to communicate effectively with students, staff, and the public.
- Demonstrated familiarity with Montana school funding, federal school funding and school finance. Experience in managing multimillion dollar budget.
- Ability to understand and interpret complex problems and perform related analysis to determine practical solutions including those relating to a variety of statutory rules and regulations.
- Ability to effectively manage federal and state grants in compliance with applicable requirements and regulations.
- Ability to administer a variety of projects and requests to achieve timely resolution and completion.
- Proven ability to work effectively as part of a team leader or a team member.
- Excellent work habits; ability to effectively manage time and responsibilities.

Preferred Qualifications: Master's Degree in accounting; finance, business economics or closely related field. Certified Public Accountant (CPA) certification, Certified Governmental Financial Manager (CGFM), and Significant leadership experience.

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 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. 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 25 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.

The information contained in this job description is for compliance with the American with Disabilities Act (ADA) and is not an exhaustive list of duties performed for this position. Additional duties are performed by the individuals currently holding this position and additional duties may be assigned.

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.