



Oregon Association of School Business Officials  
 Professional Certification Program  
***Supervisor Evaluation – Form I***

**This form must be filled out by the applicant’s supervisor.  
 Please read instructions before filling out this form.**

Dear Supervisor:

The Certification Program Committee requests your evaluation of the applicant's qualifications as a school business official. The program has been designed to motivate professional growth of school business officials and to give recognition for their achievements.

Applicant Information	
Name:	
Dates employed:	– <i>Currently</i>
Applying for:	<input type="checkbox"/> Certified Business Specialist <input type="checkbox"/> Certified Business Manager

Standards		
<input type="checkbox"/> Accounting	<input type="checkbox"/> Budget	<input type="checkbox"/> Communications Management
<input type="checkbox"/> Facilities	<input type="checkbox"/> Food Service	<input type="checkbox"/> Payroll
<input type="checkbox"/> Personnel	<input type="checkbox"/> Purchasing	<input type="checkbox"/> Risk Management
<input type="checkbox"/> Technology	<input type="checkbox"/> Transportation	

Complete each standard checked. "The Educational Enterprise" standard must be completed for all applicants. Utilize the following scoring matrix in completing this evaluation:

**Y = Yes**  
**N = No**  
**N/A = Not applicable**

The Educational Enterprise
<p>Recently the relationship between a school's business practices and the education of students has been given more attention. School business officials are central to the successful operation of the educational enterprise. Due to the public's increased demand for accountability, the expanding complexity of our society and the challenge to do more with less, the school business official must endorse certain standards.</p> <p><b>Organization and Administration:</b> <i>Demonstrates ability to motivate others, delegate authority, make decisions, process information, and problem solve effectively. Demonstrates appropriate organizational leadership skills and maintains a positive working relationship with staff.</i></p> <p><b>Legal Issues:</b> <i>Understands and applies appropriate statutory and rule compliance for the standard applied for in the application. Applies "ethical performance" as it relates to school business.</i></p>

## Accounting Specialist

The accounting specialist must be able to demonstrate, understand and comprehend the principles associated with school finance, accounting, auditing, financial reporting, cash management and investments for school business operations.

**Principles of School Finance:** *Demonstrates ability to recognize and forecast major sources of revenue, interpret state school funding model, analyze impacts of shifts in funding, spending and significant social, demographic and economic changes. Able to explore alternative and innovative revenue sources.*

**Accounting, Auditing and Financial Reporting:** *Understands and applies the concepts and standards of accounting from the Governmental Accounting Standards Board and other standards. Verifies compliance with all finance-related legal and contractual requirements. Reports the financial status of the district to the appropriate agencies.*

**Cash Management, Investments and Debt Management:** *Understands and applies the procedures and legal constraints for cash collection and disbursement. Selects appropriate financial advisors, bond counsel, etc., understands legal constraints for issuing long-term debt, lease purchasing and partnering with other municipalities. Analyzes cash flow and reports data to board on a regular basis.*

## Budget Specialist

The budget specialist must be able to demonstrate and understand the principles of school finance, budgeting and financial planning.

**Principles of School Finance:** *Demonstrates ability to recognize and forecast the major sources of revenue, interpret state school funding model, analyze impacts of shifts in funding, spending and significant social, demographic and economic changes. Able to explore alternative and innovative revenue sources.*

**Budgeting and Financial Planning:** *Demonstrates ability to forecast revenues, expenditures, personnel estimates and analyze and manage the budget. Complies with legal requirements for budget preparation and adoption. Able to recognize internal and external influences on budgets. Communicates issues and requirements to all stakeholders.*

## Communications Management Specialist

The communications management specialist must be able to process, manage and communicate vast amounts of organizational information. They must be equipped to present and articulate information to key decision makers and groups in the school environment.

**Strategic Planning:** *Able to identify short and long term goals in all aspects of school operations, assists with development and communication of the district's vision and strategic plan.*

**Support Program Evaluation:** *Demonstrates ability to identify economic and cost factors inherent in program operation and evaluation. Evaluates business and instructional support services utilizing a systematic evaluation process to measure program outcomes and effectiveness.*

**Public Relations:** *Demonstrates ability to utilize effective communication strategies. Able to identify major constituencies within the school district and present financial data to various audiences so it is easily understood using written, oral and multi-media formats.*

### Facilities Specialist

Research on learning conducted over the last 25 years has validated the effect of environmental stimuli on the learner. Expertise in areas such as physical plant planning, accountability for capital resources, and administration of the substantial public investment in schools are basic performance competencies for the facilities specialist.

**Planning and Construction:** *Demonstrates ability to develop a long range facility plan that includes demographic data. Serves on the facilities planning team. Has a working knowledge of legal procedures, funding sources, planning and construction requirements.*

**Maintenance and Operation:** *Ability to manage procedures required to keep schools clean, safe, and secure. Manages energy consumption, environmental hazards, resource allocation for maintenance and assists in the development of a crisis management plan.*

### Food Service Specialist

Food service programs serve more than 26 million children in the United States each school day. The National School Lunch Program is the largest federal child nutrition program in the United States in terms of children served. Food service specialists must be able to understand and implement current standards.

*Demonstrates ability to implement and operate the food service program within legal requirements, monitors program on an ongoing basis making adjustments where necessary. Analyzes program components, nutritional requirements and trains staff.*

### Payroll Specialist

The payroll specialist must understand all legal issues surrounding employment agreements, labor relations and the administration of personnel and benefits.

**Personnel and Benefits Administration:** *Demonstrates ability to administer employment agreements, research and explain various compensation arrangements, manage, coordinate and evaluate the effectiveness of the school district's payroll operations and other school district functions.*

**Labor Relations and Employment Agreements:** *Able to analyze laws and regulations related to employment agreements and impasse procedures. Develops models to analyze and assess the cost of current salary and benefit packages and the cost of proposals.*

### Personnel Specialist

Consider the proportion of a school district's total budget allocated to salaries, wages, and employee benefits. Human resource management, while involving many day-to-day practical considerations, also requires understanding that theory often determines practice. School business officials need to be aware of relevant management concepts and theories as well as applicable leadership styles.

**Personnel and Benefits Administration:** *Demonstrates ability to administer employment agreements, research and explain various compensation arrangements, manage, coordinate and evaluate the effectiveness of the school district's payroll operations and other school district functions.*

**Professional Development:** *Demonstrates ability to identify areas of needed professional development. Identifies appropriate procedures for evaluation of professional development programs by involving staff to enhance the effectiveness of training and development programs.*

**Labor Relations and Employment Agreements:** *Able to analyze laws and regulations related to employment agreements and impasse procedures. Develops models to analyze and assess the cost of current salary and benefit packages and the cost of proposals.*

### **Purchasing Specialist**

Effective acquisition of property and goods requires a systematic purchasing system, operated by established procedures. Accountability in education begins with the procurement of school property and materials.

**Purchasing:** *Demonstrates ability to apply generally accepted practices and procedures to purchasing process. Administers and analyzes electronic management systems and e-procurement issues. Formulates bid requirements for specifications, advertisements and selection pursuant to legal requirements and district policies.*

**Supply and Fixed Asset Management:** *Demonstrates ability to develop a system to manage and track inventories, capital assets, acquisitions, maintenance and repair and disposal of equipment.*

### **Risk Management Specialist**

Risk management plays a role in the standards of benchmarking, best practices, and performance measurements.

*Demonstrates ability to identify, evaluate and put in place a comprehensive risk management program. Adheres to all legal requirements and directs the process of selection and employment of an insurance consultant when appropriate.*

### **Technology Specialist**

The school technology specialist must be able to demonstrate and understand principles associated with technology for school business operations.

*Demonstrates ability to direct, develop and administer a computerized information system. Applies the most current and appropriate technology to the day-to-day operations of the business office. Evaluates cost benefits of various technologies including the classroom environment. Develops appropriate specifications for technology purchasing and assists in designing and implementing the district technology plan.*

### **Transportation Specialist**

School transportation is the largest public mass transportation system today. The transportation specialist must understand the significance and responsibility and demonstrate an ability to meet standards.

*Demonstrates ability to support and maintain a transportation program that adheres to legal requirements. Monitors the transportation system, routing system, and training programs for drivers making adjustments where necessary.*

## **Certification**

This is to certify that I, the undersigned, have carefully inspected the information contained in the completed application; that said applicant has correctly named his/her responsibilities; and that all other information supplied is, to the best of my knowledge, a true and accurate statement. Further, I certify that said applicant is known by me to possess a high degree of character and integrity, and has demonstrated competence and proficiency in their school business assignments and responsibilities in this school district.

Supervisor Signature

Date

Print name:

Title:

Phone: