



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

**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 administrator. The program has been designed to motivate professional growth of school business officials and to give recognition for their achievements.

Applicant Information

Name:

Title:

Dates employed: – *Currently*

Complete all standards. Utilize the following scoring matrix in completing this evaluation:

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

The Educational Enterprise

Recently the relationship between a school’s business practices and the education of students has been given more attention. School business administrators 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 administrator must endorse certain standards.

Organization and Administration: *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.*

Public Policy and Inter-Governmental Relations: *Understands the role of the school board and other local, state and federal agencies. Applies policies, rules, and regulations set forth by these agencies on a consistent basis and understands the role of special interest groups within the district.*

Legal Issues: *Understands and applies appropriate statutory and constitutional authority for the administration of public schools. Applies “ethical performance” as it relates to school business administration and remains current with appropriate statutory and case law changes impacting schools.*

Financial Resource Management

The school business administrator must be able to demonstrate and understand principles associated with school finance, budgeting, financial planning, accounting, auditing, financial reporting, cash management, investments, debt management, and technology for school business operations.

Principles of School Finance: *Demonstrates ability to recognize and forecast major sources of revenue, interpret state school funding model, analyze the impact 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.*

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 and lease purchasing and partnering with other municipalities. Analyzes cash flow and reports data to school board.*

Technology/Management Information Systems: *Demonstrates ability to direct, develop and administer a computerized information system. Applies the most current 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.*

Human Resource Management

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 administrators 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, evaluate and coordinate the effectiveness of the school district's payroll operations with 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 school staff to enhance the effectiveness of employee 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.*

Human Relations: *Demonstrates ability to diagnose, maintain and improve organizational health and morale; develops policies and procedures to manage district personnel; assist with recruitment, selection, orientation, evaluation and termination of school personnel; develop employee assistance programs and evaluate the impact on staff morale.*

Facilities Management

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 school business administrators.

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

Purchasing & Management

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. The school business administrator coordinates the economic, efficiency, and cost effectiveness of property acquisition and management.

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, acquisition, maintenance and repair and disposal of equipment.*

Real Estate Management: *Demonstrates ability to develop procedures for acquiring and disposing of land and buildings. Able to coordinate with other agencies regarding zoning, land use and other real estate issues.*

Communications Management

The school business administrator 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 making individuals 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 presents financial data to various audiences so it is easily understood using written, oral and multi-media formats.*

Ancillary Services

Ancillary services include Risk Management, Transportation, and Food Service. The consequences of catastrophic risk are of major concern to everyone. *Risk Management* plays a role in standards of benchmarking, best practices, and performance measurement. School *Transportation* is the largest public mass transportation system today. The school business administrator must understand the significance and responsibility and demonstrate the ability to meet standards. *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.

Risk Management: *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.*

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

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

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: