

MEDICINE HAT SCHOOL DISTRICT NO. 76

SECRETARY TREASURER – ROLES AND RESPONSIBILITIES

BACKGROUND

The Secretary Treasurer is an executive officer of the District, concerned chiefly with the business management aspect of the District operation, with specific responsibility for budget control and the operation and maintenance of facilities.

POLICY

The Secretary Treasurer is directly responsible to the Superintendent and through them, accountable to the Board of Trustees.

Business Management is a service that contributes to effective education through the application of sound business principles and practices, keeping in mind at all times the ultimate aim of education, which is to provide the best educational opportunity to all young people.

GUIDELINES

1. General

- 1.1 Arrange for and attend all Board, committee, or public meetings concerning the School Board, prepare agenda and provide all reference material.
- 1.2 Maintain minutes of all meetings.
- 1.3 Prepare notices to and from the Board and its committees.
- 1.4 Prepare and execute contracts, leases, or agreements and arrange for safe keeping of all official records and documents.
- 1.5 Prepare administrative and financial reports and returns as required by the School Act or as requested.
- 1.6 Provide leadership in making business affairs contribute to educational efficiency and progress.
- 1.7 Assist with educational initiatives and programs in the public interest, within the limits of available financial resources.
- 1.8 Obtain opinions or interpretations of the School Act.
- 1.9 Advise the Board on administration or financial matters as required.
- 1.10 Arrange for election of Trustees or representatives.
- 1.11 Prepare money by-laws or other non-financial by-laws and arrange for the conduct of public referendum.
- 1.12 Administer and supervise the business and financial staff for purposes of efficiently performing the District's business.

- 1.13 Liaise with the administration authorities, public bodies or individual members of the public, to the end that the best obtainable education be offered in the schools of the District.
- 1.14 Other duties as assigned by the Superintendent from time to time.

2. Business Management

- 2.1 Organize and manage all business affairs of the Board in accordance with the School Act, District policy and administrative procedures.
- 2.2 Establish and maintain proper and adequate business and financial records, as required.
- 2.3 Prepare and submit annual budgets.
- 2.4 Plan, advise, and make recommendations to the Superintendent on all aspects of business administration and on any matters likely to significantly impact present or future responsibilities of the District or of its employees.
- 2.5 Prepare specifications and call tenders for supply of goods, equipment, and service in accordance with District policy and administrative procedures, and where required, review, summarize and report to the Board.
- 2.6 Approve all purchase requirements and initiate purchase action as necessary in accordance with budget and capital requirements.
- 2.7 Prepare routine administrative reports and statistics required by Alberta Education, Alberta Infrastructure or other authorities.
- 2.8 Assist the Superintendent in liaison between Board and administrative personnel to ensure maximum efficiency of the school system and the best educational facilities obtainable.
- 2.9 Prepare and provide quarterly budget updates to the Board.

3. Personnel Management

- 3.1 Assist in negotiation of contracts and labour relations.
- 3.2 Supervise, monitor and evaluate business and financial personnel as needed.
- 3.3 Fulfill contractual responsibilities under both Collective and employee agreements.

4. Property Management

- 4.1 Oversee jointly with the Superintendent the work of the Administrators of Facilities and Information Technology.
- 4.2 Assist in planning and development of future building requirements.
- 4.3 Ensure that the physical property of the District is adequately insured.
- 4.4 Provide for appraisals and inventories of property.
- 4.5 Prepare estimates of capital requirements for by-law purposes and be responsible for administrative detail pertaining to preparation of referendum and by-laws.

5. Transportation

- 5.1 Plan and establish bus routes as required for the needs of students in accordance with the provisions of the transportation policy.
- 5.2 Provide for sufficient funds in the budget to cover the cost of providing adequate services.

6. Public Relations

- 6.1 Within their area of responsibility, interpret and advise on Board policies to the public and municipal authorities.
- 6.2 Liaison with other government bodies, agencies, and organizations involved in education.

7. Personal Development

- 7.1 Reading current Educational and Business Management material.
- 7.2 Participates in ASBOA and related school affiliations/associations.
- 7.3 Attendance at Educational and Business Management conferences, courses and seminars.

8. Professional Qualifications

- 8.1 Ability to work effectively and cooperatively with District personnel and partner groups.
- 8.2 Commitment to strategic planning.
- 8.3 Philosophy where leadership is seen as a function, not a position.
- 8.4 Knowledge about current trends in education.
- 8.5 Skill in introducing, supporting, and supervising change.
- 8.6 Professional designation such as C.A., C.G.A., C.M.A. preferred.

9. Personal Qualifications

- 9.1 Excellent human relations skills.
- 9.2 Strong communication skills – speaking, listening, writing.
- 9.3 Guided by vision, mission, values and beliefs of the District.
- 9.4 Promote excellence as a standard for the operation of the District.

**Approved:
January 24, 2017**