

**Expectation #1: Directs the development of long and short-term financial plans that contribute to the attainment of the district’s strategic plan.**

Visionary Leadership	Instructional Improvement	Effective Management	Inclusive Practice	Ethical Leadership	Socio-Political Context
<p>Develops plans, procedures, and systems that clearly link to the district’s strategic plan. It is clear that the district’s vision has been a priority in their development.</p>	<p>Relates decisions to instructional needs whenever appropriate. Prioritizes provision of quality instruction when setting criteria for fiscal decision making.</p>	<p>Assists school administrators and department heads to develop appropriate budgets.</p> <p>Ensures plans take into account reliable projections of revenues and expenditures. Provides fiscal perspectives for consideration in setting educational criteria.</p> <p>Researches and prepares information including demographics, financial trends, revenue opportunities, and accumulation of capital.</p>	<p>Develops plans, procedures, and systems with a broad representation of appropriate stakeholders.</p> <p>Communication regarding planning activities is reciprocal and planned to meet the diverse language and cultural needs of the school community.</p>	<p>Plans, procedures, and systems are developed with an eye to their effect on various constituencies. They are designed to address inequities for individuals of diverse language, race and cultural backgrounds.</p> <p>Practices provide a model of adherence to ethical and current legal practice. Outside consultation and advice is sought, as necessary.</p>	<p>Committees are carefully composed to be representative of the school community and community at large.</p>

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**Expectation #2: Serves as the Deputy Clerk of the district, ensuring adherence to pertinent federal and state regulations relative to accounting, debt and bond management, and business operations. Acts as the contract agent for the district by developing, signing, and monitoring the implementation of contracts.**

Visionary Leadership	Instructional Improvement	Effective Management	Inclusive Practice	Ethical Leadership	Socio-Political Context
N/A	N/A	<p>Continuously evaluates and recommends revisions of policies and procedures as necessary.</p> <p>Advises the Superintendent of financial, legal, and potential legislative developments that may the district.</p> <p>Carries out administrative duties required of the Clerk and/or contract agent, as appropriate.</p>	<p>Engages in positive, frequent communication with executive and school administrators regarding operational implications of business practices.</p>	<p>Carries out these duties in an open, transparent manner. Is highly accurate and complete.</p>	<p>Engages with teachers, administrators, other personnel, and members of the community to ensure they understand financial and operational obligations.</p>

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**Expectation #3: Oversees and directs the operations of the business office including payroll and benefits, accounts payable, accounts receivable, district insurance for various purposes, and investments. Hires, supervises, and evaluates business office personnel.**

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<p>Implements the activities of the business office so that they are seen as a direct support to the achievement of the district’s strategic plan.</p> <p>Communicates explicitly to assigned staff and departments the ways in which they support the district’s strategic plan.</p> <p>Ensures goals, plans, and actions taken by designees and staff members contribute to achieving the district’s strategic plan.</p> <p>Independently examines ways in which business plans, procedures and systems can more effectively promote the district’s strategic plan.</p>	<p>Evaluates practices for their impact on instructional programs.</p> <p>Evaluates decisions and actions taken by staff, where appropriate, for their contribution to the provision of quality instruction. Encourages and promotes individuals who excel in such support.</p> <p>Prioritizes improvements or innovations based on their potential to improve educational outcomes.</p>	<p>Continuously evaluates and revises practices to ensure optimal efficiency and minimal disruption to educational activities.</p> <p>Takes actions to ensure business office staff members are qualified and productive. Implements the district’s program of evaluation with integrity.</p> <p>Ensures the business office communicates a supportive, client-oriented attitude.</p> <p>Monitors the providers of goods and services to ensure they provide both value and quality. Seeks input from affected individuals in making such evaluations.</p> <p>Ensures that evaluations effectively recognize strong performance, form a foundation for improvement where needed, and are the basis for termination where needed.</p> <p>Informs the Superintendent and executive leadership of potential improvements and emerging issues.</p>	<p>Provides services and communication in forms accessible to those who speak languages other than English, do not have digital access, or who have disabilities.</p> <p>Ensures supervision involves ongoing communication with affected personnel. Seeks input from external sources (e.g. teachers, specialists, paraprofessionals, administrators and patrons) regarding performance of assigned employees.</p> <p>Communicates with a wide variety of stakeholders to gain perspective, ideas, and information about potential district initiatives and innovations.</p>	<p>Maintains records in an efficient and legal manner.</p> <p>Models quality, meaningful implementation of evaluation programs. Ensures that a focus on development and improvement, and the contribution of individuals to the district’s goals is central to evaluations. Acknowledges the need for corrections if necessary.</p> <p>Recognizes when the welfare of students or the district requires direct intervention. Takes action.</p>	<p>Ensures that business office personnel are demographically reflective of the community.</p> <p>Develops a culture of mutual support and of service to schools, departments, and the community.</p> <p>Ensures that consideration of any change in practice will positively benefit <u>all</u> students and their families.</p>

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**Expectation #4: Fulfills the reporting and communication obligations of the district as they relate to financial matters.**

Visionary Leadership	Instructional Improvement	Effective Management	Inclusive Practice	Ethical Leadership	Socio-Political Context
<p>Develops information and reports so that they are linked to the district’s strategic plan.</p>	<p>N/A</p>	<p>Oversees the development and compilation of the district’s Comprehensive Annual Financial Report.</p> <p>Provides regular, periodic updates to executive leadership, the Superintendent and the school board regarding the status of the district’s financial and operational status.</p>	<p>Provides information in a format and by means that are readily accessible to district personnel and the community, including those who speak languages other than English, individuals with disabilities, and those who may not access information digitally.</p>	<p>Adheres to the highest standards of reporting.</p> <p>Coordinates all financial and operational reporting according to city, county, state, and federal guidelines.</p>	<p>Reports information to appropriate entities including media outlets, committees, and members of the community.</p> <p>Provides relevant information in a manner that provides context and builds support for district decisions.</p>

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**Expectation #5: Participates in labor negotiations, providing essential information regarding the financial impact of proposals.**

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<p>Evaluates the cost of proposals through the lens of the district’s strategic plan and values. Communicates that analysis to the bargaining team as appropriate.</p>	<p>Examines the cost of contract proposals relative to the district’s ability to ensure the provision of quality instruction.</p>	<p>Maintains and continuously updates information necessary for bargaining, including demographic and economic projections, information about comparable school districts, changes in benefits over time, and the effect of proposals on the district’s finances.</p>	<p>N/A</p>	<p>Maintains confidentiality and models respect for the bargaining process. Provides information that is highly accurate and useful for decision making.</p>	<p>Considers the perception of the public and general political climate in the evaluation of proposals.</p>

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**Expectation #6: Protects the short and long term financial health of the district and improves the district’s financial prospects.**

Visionary Leadership	Instructional Improvement	Effective Management	Inclusive Practice	Ethical Leadership	Socio-Political Context
<p>Designs and presents information that allows decision makers to assess their impact on achieving the district’s strategic plan.</p>	<p>Makes recommendations for expenditures and reductions that promote and protect the provision of quality instruction.</p>	<p>Monitors expenditures for schools and departments against the annual budget. Recommends adjustments.</p> <p>Keeps abreast of developments that will affect revenues and expenditures. Informs decision makers and the public.</p> <p>Identifies opportunities for improvements, cost reductions, systems enhancement, and accumulation of capital.</p>	<p>Seeks input regarding data necessary for meaningful planning from administrators, supervisors, teacher groups, and district patrons.</p>	<p>Ensures data are truly representative and meaningful. Is transparent about alternative or competing information that might affect decisions.</p>	<p>Develops and presents information with sensitivity to the communication needs of the school community and general public.</p>

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**Expectation #7: Assists in the day to day operations of schools, especially as related to budgetary and financial matters.**

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<p>Helps administrators and others evaluate situations and potential actions based on the district’s strategic plan.</p>	<p>Helps administrators and others maintain a focus on how issues might affect the provision of quality instruction. Assists in problem solving to maximize quality instruction.</p>	<p>Makes self available to school personnel and the public to communicate about financial issues.</p> <p>Is proactive in identifying potential issues, makes effective plans to address them.</p> <p>Is responsive in a timely manner to school personnel and community patrons.</p> <p>Ensures issues are resolved.</p> <p>Informs leadership about emerging financial or business related issues; takes necessary action to resolve issues.</p>	<p>Seeks information about operational successes and needs from a wide variety of individuals, including those who do not speak English, who may have disabilities, or may not be able to access information digitally.</p>	<p>Maintains uniform expectations for different schools and programs.</p>	<p>Acts as a source of information and perspective for school administrators, teachers, and other personnel.</p> <p>Maintains an awareness and understanding of the political and cultural climate of the community.</p>

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**Expectation #8: Functions as a member of the executive leadership team for the district. Actively considers, discusses, reflects upon, and problem solves issues that come before the team.**

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<p>Articulates, supports, and helps refine the district’s strategic plan.</p> <p>Seeks strategies and solutions that allow the district to move toward its strategic plan.</p>	<p>Considers the decisions and prioritization of actions taken by the leadership team through the lens of instructional improvement.</p> <p>Develops efficiencies in business operations with the intent of providing administrators more time to act as instructional leaders.</p>	<p>Brings important issues to the team in a timely manner.</p> <p>Provides the team with necessary data so that decisions can be made.</p> <p>Proposes solutions.</p> <p>Assists and educates administrators in managing school and departmental budgets.</p>	<p>Assists the team in identifying appropriate individuals from whom to gain a variety of perspectives.</p> <p>Seeks input from administrators on a regular basis regarding the effectiveness of business office procedures.</p> <p>Promotes a climate of support and assistance in business operations.</p>	<p>Adheres to group agreements and commitments.</p> <p>Supports the leadership team to external individuals and entities.</p> <p>Treats administrators and department heads fairly.</p> <p>Intervenes to protect the interests of the school district, as appropriate.</p>	<p>Seeks to understand the various perspectives of different members of the school community. Helps the team to keep this in mind when considering issues. Advocates for traditionally unheard groups.</p>

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**Expectation #9: Utilizes the appropriate level of direction when working with personnel including *collaboration, consultation, direction, and correction.***

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Utilizes a level of direction that is appropriate when taking into consideration an individual’s ability or preparedness to meet district goals.	N/A	Ensures that types of direction and decision making processes are clear to affected individuals.	Seeks feedback regarding effectiveness of direction from affected individuals.	Ensures that the type of direction selected will contribute to the integrity of the district, protect and promote the welfare of students, and will result in legally compliant practice.	Adjusts actions and responses to the background and needs of the individual, while maintaining high standards.

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**Expectation #10: Communicates effectively with a wide variety of individuals including staff, students, and members of the community.**

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<p>Actively plans for ongoing, reciprocal communication with groups and individuals regarding the district’s strategic plan as it relates to assigned duties.</p> <p>Develops materials that, where appropriate, explain how district policies and procedures promote the district’s strategic plan.</p>	<p>N/A</p>	<p>Works with the Superintendent or supervisor to identify key communication needs.</p> <p>Ensures personnel understand the importance of effective communication in reaching the district’s goals.</p> <p>Encourages and expects subordinates to employ excellent written and verbal communication.</p> <p>Develops and implements protocols for development and dissemination of staff resource materials.</p> <p>Maintains an ongoing program of review and revision to ensure materials are current and useful.</p>	<p>Ensures all personnel and patrons have access to district information and appropriate decision making or input activities.</p> <p>Actively plans for the involvement of individuals that is appropriate to their cultural attributes, language, or disability related needs.</p> <p>Seeks input from internal and external sources regarding the need for and adequacy of materials.</p> <p>Ensures materials are presented in a manner so they are accessible to individuals who do not speak English, who may have disabilities, or may not be able to access information digitally.</p>	<p>Ensures that communication is complete, transparent, and appropriate to the audience.</p> <p>Utilizes excellent judgment in the choice of information to share.</p> <p>Seeks assistance from outside resources for communication, where necessary.</p> <p>Assesses the need for such materials from an ethical and legal perspective.</p> <p>Ensures that such materials assist personnel in behaving in an ethical and legal manner.</p>	<p>Actively works to address cultural, language, or other needs in all communication endeavors.</p> <p>Develops skills in communicating with individuals from various groups.</p>

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**Expectation #11: Uses excellent decision making that moves the district forward in reaching its goals.**

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<p>Consistently makes and implements decisions that are clearly aligned with the district’s strategic plan.</p> <p>Uses data and objective information in recommending or making decisions.</p>	<p>Prioritizes decisions about resources of time, money and personnel with the provision of quality instruction at the forefront.</p> <p>Ensures decisions make it easier for teachers to provide quality instruction and that principals are able to protect instructional time and quality.</p>	<p>Examines business practices and allocation of resources for their contribution to district goals.</p> <p>Recommends modifications to the management of assigned programs.</p>	<p>Seeks an appropriate level of input from stakeholders, prior to making decisions.</p>	<p>Ensures that sufficient consideration is made of the legal and ethical attributes of decisions.</p>	<p>Is careful to consult directly with affected or potentially affect groups or individuals when making decisions.</p> <p>Explicitly evaluates the effects of decisions on the school, district, and local communities.</p>

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**Expectation #12: Communicates with colleagues, staff members, students and patrons directly, with empathy and respect, and in a timely manner.**

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<p>Communicates in a harmonious manner that is direct and empathetic, but keeps the strategic plan of the district in the forefront.</p>	<p>N/A</p>	<p>Recognizes when communication with supervisor, colleagues, teachers, students or parents is necessary.</p> <p>Provides information that promotes the attainment of the district’s goals while protecting its integrity and reputation.</p>	<p>Continuously develops understanding of the communication needs and styles of various affected groups. Engages assistance from experts as needed.</p>	<p>Restricts communication about sensitive topics to appropriate individuals.</p> <p>Protects confidentiality of students, staff, and patrons.</p>	<p>Thoroughly analyzes which individuals and groups should be included in communication activities. Is proactive and affirmative in reaching out to parties.</p>

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