

## **ROLE OF ASSISTANT SECRETARY-TREASURER**

### **Background**

Guided by the District's vision, mission, motto and values, and our goals, the Assistant Secretary-Treasurer will assist the Secretary-Treasurer in fulfilling the general and specific aspects of the role description for the Secretary-Treasurer as defined in the School Act and Board policy.

### **Procedures**

The Assistant Secretary-Treasurer is directly responsible and accountable to the Secretary-Treasurer. When assigned by the Secretary-Treasurer, the Assistant Secretary-Treasurer assumes all responsibilities of the Secretary-Treasurer in the Secretary-Treasurer's absence.

The Assistant Secretary-Treasurer will have specific responsibilities for:

#### **1. Fiscal Responsibility**

- 1.1 Ensures the fiscal management of the District is in accordance with the terms or conditions of any funding received.
- 1.2 Ensures the District operates in a fiscally responsible manner, including adherence to recognized accounting procedures.
- 1.3 Provides for the fiscal management of revenues and expenditures in accordance with organizational goals (including school-based decision making), approved budgets, and statutory requirements.
- 1.4 Monitors the area of financial services and makes recommendations to the Secretary-Treasurer, regarding continuous improvements for effectiveness and efficiency.
- 1.5 Produces financial accountability and other reports in compliance with all legal and Ministerial mandates and timelines, and Secretary-Treasurer directives.
- 1.6 Reviews the disbursements of all monies and control of expenditures for the District's capital projects.
- 1.7 Assists school sites with the management of their financial affairs.

#### **2. Audit Supervision**

- 2.1 Ensures that an internal audit program that meets generally accepted standards is in place.
- 2.2 Brings forward any issues identified by internal audit to the Secretary-Treasurer along with recommendations for resolution.
- 2.3 Liaises with the district's external auditor and prepares supporting schedules and working papers as required.

#### **3. Human Resources Management**

- 3.1 Supervises, evaluates and reviews the performance of “direct reports”.
  - 3.2 Assists the Secretary-Treasurer as required with the recruitment and selection of professional staff.
  - 3.3 Collaborates with the Secretary-Treasurer in the supervision and evaluation of school-based administrative staff, as requested.
4. Policy/Administrative Procedures
- 4.1 Assists the Secretary Treasurer in the planning, development, implementation and evaluation of Board policies and administrative procedures within areas of responsibility.
  - 4.2 Ensures the application of Board policies and administrative procedures as required in the performance of duties.
5. Organizational Management
- 5.1 Within areas of responsibility, demonstrates effective organizational skills resulting in compliance with all legal and Board mandates and timelines and adherence to all Secretary Treasurer’s directives.
  - 5.2 Contributes to a District culture which facilitates positive results, effectively handles emergencies and deals with crisis situations in a team-oriented, collaborative and cohesive fashion.
6. Communications and Community Relations
- 6.1 Takes appropriate actions to ensure open, transparent internal and external communications are developed and maintained in areas of responsibility.
  - 6.2 Ensures students, staff and parents have a high level of satisfaction with the services provided and with effective management in the Finance Department.
7. Secretary Treasurer Relations
- 7.1 Establishes and maintains positive, professional working relations with the Secretary Treasurer.
  - 7.2 Honours and facilitates the implementation of the Board’s roles and responsibilities as defined in Board policy and encourages staff to do the same.
  - 7.3 Provides information which the Secretary Treasurer requires to perform their role in an exemplary fashion.
8. Leadership Practices
- 8.1 Practices leadership in a manner that is viewed positively and has the support of those with whom he works in carrying out the Secretary Treasurer's expectations.
  - 8.2 Exhibits a high level of personal, professional and organizational integrity.

Reference: Sections 22, 65, 85 School Act

Adopted: November 2019

Revised: