

Katherine Burden

1884 Shady Lane, Beavercreek, OH. 45432
937-371-6114

KatherineLBurden2@gmail.com

Dear Ms. Cramer,

I am writing to express my interest in the Treasurer position for Bellbrook-Sugarcreek Local School District. As someone passionate about both financial management and the advancement of educational opportunities, I am excited about the chance to contribute to the district's financial success and overall mission.

Although this would be my first role as a Treasurer, I bring a solid foundation in financial principles and a commitment to fiscal responsibility. My background includes experience in payroll, strategic planning, and process improvement, all of which have equipped me with a strong understanding of how to manage and support the Treasurer's office effectively. I am eager to apply these skills to support the district's goals and ensure the responsible stewardship of its financial resources.

One of my greatest strengths is my ability to learn quickly and adapt to new challenges. I am confident in my ability to gain a deep understanding of the district's financial landscape and contribute to informed decision-making processes. My strong communication skills and collaborative approach will enable me to work effectively with district staff, the Board, and the community to ensure transparency and accountability.

I am particularly drawn to this opportunity because of the district's commitment to providing high-quality education and fostering a supportive learning environment. I am excited about the possibility of playing a role in sustaining and enhancing these efforts through sound financial management. Thank you for considering my application. I am eager to discuss how my background, enthusiasm, and fresh perspective can contribute to the success of Bellbrook-Sugarcreek Local School District. I look forward to the opportunity to further explore how I can be a valuable asset to the team.

Sincerely,

Katherine Burden

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Experience

Miamisburg City Schools Treasurer: Justin Blevins/ Katrina Hillard

Assistant to the Treasurer: 11/2021 - Present

- Verified calculations for new contracts and salary schedules, ensuring accuracy.
- Managed attendance tracking using sign-in sheets, records, and Kiosk entries, conducting monthly audits to ensure completeness.
- Balance and process payment for EPC and American Fidelity billing.
- Oversaw software testing and communication for new time and attendance application. Worked with developers to meet district specific needs.
- Coordinated record disposal based on approved retention schedule and prepared budget and purpose statements for board approval.
- Track grant budget expenditures, processed adjustments, and managed CCIP requests for grant funding.
- Processes invoices for facility rentals, monthly insurance payments, vendor donations, shared transportation, and anything additional needed.
- Assisted in Payroll and Accounts Payable tasks, compiled payroll/financial records, and prepared reports for district and agencies.
- Responsible for Monthly, Quarterly, Yearly, and Fiscal year reporting, including: W2's, payroll balancing 941, 941b, State, City, and ODJFS.
- Received training on processing Foundation payments, budget transfers, advances, interest payments, and bank deposits.
- Trained new Assistant Treasurer in office procedures, grant budgeting, payroll processes, and reporting procedures.
- Completed additional duties as assigned by Treasurer and Assistant Treasurer.

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Experience

Montgomery County ESC Treasurer: Christopher Fox

Payroll Officer: 11/2019 - 11/2021

Subbed from 11/2021 - 4/2022 and 6/2022 - 8/2022

- Coordinated and executed technical accounting tasks for scheduled and unscheduled payrolls in the district, ensuring accuracy and compliance.
- Reviewed payroll forms for completeness and accuracy, verifying employee leave through Kiosk.
- Assisted in budget preparation and maintenance, making necessary journal entries and adjustments.
- Provided training to district and school staff on payroll procedures.
- Monitored and optimized workflow to enhance payroll efficiency and effectiveness.
- Conducted routine audits of records, resolving discrepancies and ensuring accuracy in attendance and insurance billing.
- Implemented guidelines and procedures for payroll processing, utilizing data processing software like AESOP and KIOSK.
- Calculated salaries, overtime, leave, and benefits eligibility for employees.
- Managed employee retirement benefits, tax-sheltered annuities, and insurance benefits processing.
- Assisted in payroll check distribution, direct deposit notifications, and ledger posting.
- Reconciled deductions and benefits after each payroll cycle.
- Supported in retaining, balancing, and filing Retirement System reports.
- Compiled and prepared various payroll and financial reports as required by the district and other agencies.
- Responsible for Monthly, Quarterly, Yearly, and Fiscal year reporting, ensuring accurate tax reporting and W2 generation.
- Created yearly salary schedules and job calendars, updating tracking sheets.
- Attended and contributed to district meetings and addressed inquiries and concerns.
- Performed clerical tasks including report preparation, correspondence, and data entry.
- Participated in training sessions to enhance job knowledge and skills, including Green Belt Training to optimize processes from hiring to payroll distribution.

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Experience

Deer Park City Schools Treasurer: Melissa Harner

Payroll and Benefits Specialist: 09/2017 - 11/2019

- Trained initially in Classic software, later assisted with the onboarding of USPS, enhancing payroll efficiency.
- Implemented BRDDS to automate board-paid deductions, reducing manual errors and processing time.
- Coordinated technical accounting tasks for scheduled and unscheduled payrolls, ensuring accuracy.
- Managed onboarding of new hires, tracked paperwork status, and verified certifications with ODE.
- Oversaw coaches' hiring, ensuring completion of required certifications and training.
- Created, distributed, and tracked employee salary notices and contracts.
- Managed open enrollment and insurance changes manually through insurance websites, later implementing online enrollment via Benalogic.
- Reviewed and verified payroll forms and employee leave through Kiosk, providing training to staff.
- Conducted routine audits of records, resolving discrepancies, and streamlining billing processes.
- Implemented guidelines and procedures for payroll processing, utilizing AESOP and KIOSK.
- Calculated salaries, overtime, leave, and benefits eligibility for employees
- Managed processing of employee retirement benefits, tax-sheltered annuities, and insurance benefits.
- Balanced payroll check distribution, reconciling deductions and benefits.
- Compiled data and prepared payroll/financial reports for the district and agencies.
- Ensured accurate tax reporting and W2 generation, attending to federal, state, and city tax divisions.
- Created yearly salary schedules and job calendars in USPS, updating tracking sheets.
- Attended District meetings and addressed inquiries, concerns, and complaints.
- Performed routine clerical tasks and attended training sessions to enhance skills and knowledge.

Katherine Burden

Education/Certification



Ohio Treasurer License

Signed off: August 31, 2024



University of Phoenix

Ohio School Treasurer Coursework

July 1, 2024



University of Phoenix

Bachelor of Science in Business

July 1, 2024



The Ohio State University

Atmospheric Science

Transferred to University of Phoenix



Sinclair Community College

Political Science/Geography

Skills



Skilled in analytical thinking and adept at problem-solving.



Proficient in USPS and USAS systems.



Experienced with Kiosk software for attendance tracking.



Skilled in Microsoft Word and Excel.



Proficient in interpersonal communication and effective in conveying ideas and information.

References

John Espy: (Former Boss) John.Espy@gmail.com

Treasurer Loveland City Schools

513-312-8478

Dawanna Cron: (Former Boss) Dawnnajo@live.com

Former Assistant Treasurer Montgomery County ESC

937-418-1245

Justin Blevins: (Former Boss) Justin.Blevins@Ketteringschools.org

Treasurer Kettering City Schools

937-776-4616

TREASURER/CFO CANDIDATE - SCREENING INFORMATION

Instructions: Please download this form to your computer and save it. Then in the space provided answer the question. If you do not have experience with one or more of the subject areas respond by placing **NA** for those which are not applicable. Then re-save the document, reattach it to your email and resend it to the K-12 search consultant or fax it to 614-656-7526.

Candidate Name : _____ Mobile Phone: _____ Date: _____

School Treasurer Experience: Y or N ADM of largest district Served: _____

Latest Experience in what district? _____ How Long? _____

On what terms was your service with that district ended? _____

Explain briefly why are you interested in this position?

Have you prepared monthly financial reports for a Board of Education and administration? If yes briefly discuss your experience in preparing reports:

Have you worked with administration to prepare building and department budgets and the Annual Appropriation Resolution for a school district? If yes, what was your most recent experience and your role:

Have you prepared financial reports related to school construction funds and budgets? If yes, please discuss the type of reports you have prepared for the administration and Board.

Have you prepared a five-year forecast for a school system? Y or N

If yes what was the date of most recent five-year forecast you prepared and for what school district:

Roughly how many staff negotiations have you been involved in and what school district was your most recent negotiations experience in and briefly discuss your role?

Roughly how many levies and types have you been involved in and what was your role?

Have you been involved in a school construction program? Y or N Was it OSFC? Y or N

Discuss your involvement if you answered yes to either of the two previous questions related to construction?

Have you made financial presentations to your Board, administration and/or community? Y or N

If you answered yes to the previous question how would you rate your presentation skills and ability to react quickly on your feet to questions and why?

How would you rate your written communication, and have you ever contributed articles on finance in a district wide newsletter or similar publication? Please explain:

How would you implement changes in this district if you saw the need and how would you engage others?

Have you restructured a treasurer's department including writing or refreshing job descriptions and aligning or changing job duties of existing staff? Please Explain:

Please explain how often you evaluate your current staff and briefly describe the process you use and how important it is to you to provide feedback to your staff:

What five things would you do as Treasurer in first 6 months if you were selected for this job?

In the space provided briefly explain why the Board of Education should consider you for this position and what unique talents you would bring to the district:

When would you be available to start?

What base salary expectation would you have?

Please return this information to the K-12 consultant or fax it to
614-656-7526. Thank you for helping us get to know you better!

OHIO STATE BOARD OF EDUCATION
5 Year School Treasurer School Treasurer License

KATHERINE LYNNE BURDEN

THIS LICENSE AWARDED TO

OH3517131

EDUCATOR STATE ID

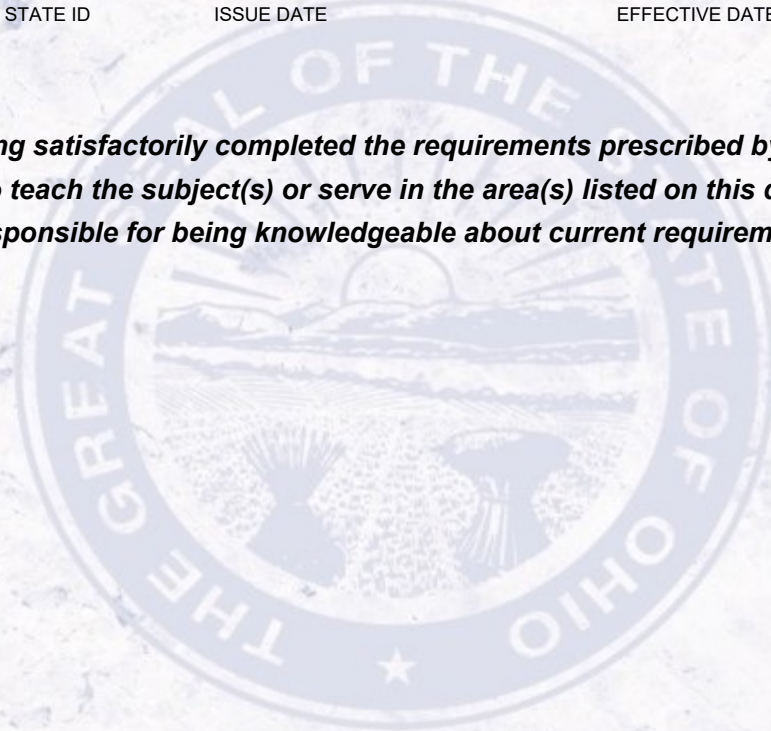
09/04/2024

ISSUE DATE

07/01/2024 to 06/30/2029

EFFECTIVE DATES

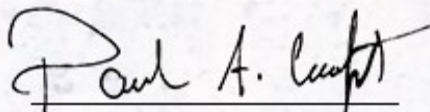
The holder of this credential, having satisfactorily completed the requirements prescribed by The State Board of Education and the laws of Ohio, is authorized to teach the subject(s) or serve in the area(s) listed on this document for the period specified. The holder of this credential is responsible for being knowledgeable about current requirements for maintaining the credential.



This official document was created by the State Board of Education and represents a true copy of a legal educator license as referenced in Ohio Revised Code Section 3319.36.

Credential # 22546306

Employers may verify this credential by going to Educator Profile on sboe.ohio.gov and ensuring that the unique credential number appearing on this credential matches the person's records in Educator Profile, which is the official record of educator credential history.


Superintendent of Public Instruction

School Treasurer Internship Verification Form

The 300-hour internship should be an individualized, mutually developed series of experiences reflective of the results of an assessment of the educational needs of the intern to the role, functions and responsibilities of the treasurer. The 300 hours of field experience should be well distributed over the following areas:

1. Overview of Treasurer and Business Office Responsibilities (10 hours)
 - a. Review of statutory duties
 - b. Relationship with board of education
 - c. Role and relationship with superintendent and other administrators
 - d. Relationship with other offices and officials
2. Financial Management (20 hours)
 - a. Basic banking and depository requirements
 - b. Investments
 - c. Bonds and notes
3. Fund Accounting (50 hours)
 - a. Processing accounts payable and receivable
 - b. Receipts
 - c. Billing and invoices
 - d. Purchase orders and encumbrances
 - e. Petty cash and change funds
 - f. Student activity funds/management
 - g. Internal accounting controls
4. Financial Reporting (50 hours)
 - a. Budget and appropriations
 - b. Financial forecasting and fiscal analysis
 - c. General purpose financial statements, cash reporting
 - d. GAAP
5. Purchasing and business functions (80 hours)
 - a. Bidding and purchasing procedures
 - b. Employee contracts
 - c. Payroll processing/distribution/reports
 - d. Employee benefits (type, enrollment and claims)
 - e. Salary schedules
6. Legal/Legislation (50 hours)
 - a. Ohio compliance functions
 - b. Fiscal certificates
 - c. Legal notices
 - d. Short-term and long-term borrowing
 - e. FMLA, ADA, FLSA, Workers' Compensation
7. Administrative and Other Duties (20 hours)
 - a. Board secretary – minutes and role at board meetings
 - b. Member of administrative team/role with policy team
 - c. Record retention/destruction
 - d. Collective bargaining (public sector)
8. Other areas, if appropriate, to the particular district and its needs (20 hours)

The information below must be completed by the licensed, supervising school treasurer. Please be sure all required information is correct and included on the form. An incomplete or incorrectly completed form will not be accepted, and a new form will be required.

I hereby certify that Katherine Burden

Name of Applicant

Educator State ID

Has successfully completed all internship requirements, as specified above, for the School Treasurer license.

The beginning date of the internship was November 1, 2021

The ending date of the internship was August 31, 2024

Signature of licensed supervising school treasurer

Printed name of licensed supervising school treasurer John Espy

Educator State ID of licensed supervising school treasurer OH3023369

Ohio school district and IRN Loveland City School District

Name of School or District

044271

IRN