



ASSOCIATE DIRECTOR – FINANCIAL SERVICES

Position Summary

Under the direction of the Chief Financial Officer/Director of Support Services, plans, organizes, directs, supervises, and personally performs professional fiscal activities in conformance with appropriate laws and regulations.

Plan, direct and review the activities and operations of the Financial Analysis, Budget, Purchasing, Nutrition Services and Warehouse sections, including revenue and expenditure forecasting, technical support to citizen committees, negotiations supports, coordination of the district's annual budget process, procurement of goods and services, nutrition services and warehouse operations; act as district's purchasing official; provide professional and strategic analysis and counsel to the Chief Financial Officer, Superintendent, Superintendent's Staff, Budget Committee and Board. Manage all staffing issues related to assigned areas including recruitment, performance, retention and evaluation.

Supervisory Relationships

Report to the Chief Financial Officer/Director of Support Services. Directly supervise Financial Analysis, Budget, and Purchasing staff, Warehouse Supervisor and Nutrition Services Director. Indirect reports include warehouse and nutrition services staff.

Essential Functions

- Direct the development of the division work plan; assign work activities, projects and programs; monitor work flow; review and evaluate work projects, methods and procedures.
- Supervise the monitoring of the district's financial outlook and preparation of the district's annual financial forecast, annual budget, supplemental budgets and ongoing revenue and expenditure projections.
- Assist the Chief Financial Officer/Director of Support Services in the coordination of resource allocation decisions during the annual budget process.
- Supervise, evaluate and provide professional growth opportunities for the financial analysis, budget, and purchasing staff, Warehouse Supervisor and Nutrition Services Director.
- Oversee the development of solicitation documents and review staff analysis of responses.
- Award bids, quotes, and RFP's, and resolve vendor protests of bid specifications and bid awards; interpret policies and procedures related to the bidding process, purchasing and public contracting.
- Assess the impact of procurement awards on district-wide operations and systems and coordinate communications among related staff.

- Ensure that district procurement activities are in compliance with Federal, State and local laws, codes, regulations and board policy.
- Administer the financial and legal aspects of the district's contracts with charter schools.
- Oversee the integrity of costing models used in employee group negotiations; serve on district negotiation team(s).
- Review and recommend action on proposed and approved legislation and regulations related to school funding, procurement, nutrition services, and charter schools.
- Design financial models, create and/or evaluate proposals for changes in operations.
- Manage highly complex projects as assigned; provide staff assistance to the Superintendent's Staff, Budget Committee and Board in the development and implementation of financial, service and political strategies.
- Coordinate the financial aspects of District levy or bond elections. Oversee technical analysis and management of the issuance of bonded debt.
- Advise the Chief Financial Officer/Director of Support Services and Superintendent on forecast/budget issues with internal and/or external implications.
- Oversee warehouse operations including inventory, courier and mail services, excess property and school consolidations.
- Provide direction and support to Nutrition Services Director and oversee nutrition services operations including administering nutrition services management contract and free/ reduced application process, ensuring appropriate staffing levels and menu choices, and working to address community and student concerns regarding the program.
- Respond to requests for information; advise schools, departments and the public on issues in assigned areas, policies and strategies; addresses sensitive issues and complaints.
- Recommend goals and objectives; assist in the development of and implementation of financial policies and procedures; evaluate the effectiveness of financial operations and structures; modify strategies to achieve goals.
- Evaluate assigned staff; assign work and ensure appropriate training is provided; investigate complaints; recommend and administer any necessary disciplinary action; handle sensitive personnel matters and recommend grievance responses; exercise full supervision over employees; facilitate staff development on such issues as diversity and creating a respectful working environment.
- Keep abreast of relevant new developments in professional standards, legislation and industry practices.

- Work with the Department of Education, Confederation of Oregon School Administrator, Oregon School Boards Association and other agencies on issues related to the State School Fund formula and public purchasing law.
- Serve as Chief Financial Officer/Director of Support Services as assigned.
- Perform related duties as assigned.

Required Knowledge, Skills and Abilities

- Thorough knowledge of principles and practices of public financial management, including governmental accounting, budgeting, debt issuance, financial forecasting, revenue analysis, cost analysis, fund management, operational analysis, strategic financial planning, and public policy analysis.
- Knowledge of the principles and practices of governmental purchasing.
- Strong knowledge of research and reporting methods, techniques, and procedures.
- Thorough knowledge and understanding of Federal, state and local legislative process; laws, codes and regulations related to the financial administration of school districts and charter schools.
- Demonstrated knowledge of State of Oregon's Local Budget Law, public purchasing statutes and State School Fund formula.
- Knowledge of current social, political, and economic trends, as well as operating challenges, affecting school districts.
- Knowledge of principles and practices of project management, strategic planning and community engagement.
- Knowledge of principles and practices of supervision, training and personnel management.
- Effectively prepare and administer the district's budget; develop and institute sound budgeting systems, practices and procedures.
- Set work priorities, delegate and monitor progress on assignments
- Analyze, interpret, summarize and present complex financial, administrative, contractual, statistical and technical information and data in a clear manner.
- Design and implement models for financial, operational, legislative and policy analysis.
- Research, interpret and apply federal, state and local laws, regulations and codes.

- Ability to analyze problems, identify alternative solutions, project consequences of proposed actions and implement selected strategies.
- Ability to work effectively with staff at all levels of the organization and with other agencies, appointed and elected officials, parents, and community members.
- Effectively scope complex assignments, determine appropriate staff assignments, develop a work plan, prepare and/or oversee complex financial analysis, and propose and/or review proposed recommendations or solutions.
- Identify and respond to citizen, media, board and Budget Committee questions, issues and concerns in a positive manner.
- Analyze and interpret proposed legislation, State statues and rules and professional/industry standards around public sector budgeting and procurement.
- Evaluate and formulate strategic direction and policies; propose recommendations, implement and monitor policies and strategies.
- Hire, train, supervise, coach, manage performance and evaluate staff; set work priorities, delegate to staff and monitor progress on assignments.
- Understand and administer district personnel policies and procedures.
- Prepare and administer a work unit budget and provide contract management for professional service contracts.
- Communicate clearly and concisely, both orally and in writing, to a wide range of audiences.
- Establish and maintain cooperative internal and external working relationships.
- Evaluate and develop improvements in operating procedures, policies, and methods.
- Use a variety of personal computer and network applications.

Minimum Qualifications Summary

Education

- Bachelor's degree from an accredited college or university in finance, public administration, management, business, or a closely related field.

Experience

- Seven (7) years of increasingly responsible experience in public financial management with budgeting, accounting, auditing, legislative and policy analysis, and project management experience, including five (5) years of supervisory responsibility.

Preferred Qualification(s)

- A Master’s degree in from an accredited college or university in finance, public administration, management, business, or a closely related field.

Any combination of experience and training that would likely provide the required knowledge and skill may be considered qualifying as determined by Human Resources.

Work Environment

Incumbents work in a fast-paced office environment and may be required to work overtime and weekends as needed.

ADDITIONAL INFORMATION	
Employee Unit	4J Association (4JA) - Professional
Pay Grade	Grade 13
Approved by	Susan Fahey – <i>Chief Financial Officer/Director of Support Services</i> Dr. Celia Feres-Johnson – <i>Director of Human Resources</i>
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