



## DIRECTOR OF FINANCIAL SERVICES

---

### Position Summary

Purpose: Plan, implement, manage, and ensure the success of all aspects of the District's budget, financial services, and business systems. Direct the financial services of the district and oversee all daily activities related to planning, implementing, managing and controlling costs of financial-related activities, including Business Systems and Financial Services (accounting, finance, payroll, budget, forecasting, strategic planning, costing, analysis and negotiations, investments, etc.). Provide professional and strategic analysis and counsel to the Superintendent, Cabinet, Board, Budget Committee and District administrators. Support and implement strategic Board goals and provide direction and leadership in the achievement of the District's philosophy, mission, vision and annual goals and objectives.

### Supervisory Relationship

This position reports to the Assistant Superintendent for Support Services and serves on the Superintendent's Executive Council. This position provides organization-wide leadership and either directly or indirectly supervises all finance-related staff, non-exempt staff, managers and supervisors.

### Essential Functions

1. Direct all administrative and financial functions of Financial Services.
2. Provide leadership in and execute all duties in the highest ethical manner.
3. Ensure compliance with ethics laws, policies, and directives.
4. Perform all duties of the Chief Financial Officer for the District including leading strategic financial planning initiatives such as long-range financial forecasts and service and funding plans. Facilitate District Directors in identifying financial goals for the District.
5. As a member of the Superintendent's Executive Council, participate in setting strategic direction and policies for the organization, addressing district-wide and cross departmental management issues.
6. Serve as District spokesperson on financial issues; present District's fiscal position to the organization, School Board, budget committee and the public. Prepares and submits agenda items for presentation and discussion before the School Board.
7. Perform all duties of deputy clerk for the District, entering into financial related obligations on the District's behalf.
8. Perform all duties of a budget officer as required by state law. Prepare the annual budget under the general direction of the Superintendent for proposal to the School Board and budget committee. Ensures the budget process and financial reporting complies with applicable laws and District policy.
9. Coordinate all financial aspects of District elections for ballot measures and levies. Coordinate issuance of general obligation bonds and management of District debt.
10. Oversee district budget: review financial status reports, prepare, and revise projections, ensure budgetary transactions comply with statutes governing public bodies, and make recommendations on budget changes.
11. Oversee the creation of the District's Comprehensive Annual Financial Report (CAFR). Complete complex portions of the report and ensure all aspects of the report are reviewed for accuracy and completeness prior to audit. Present the audited CAFR to the

- Audit & Finance Committee of the Board, and ensure the CAFR is presented to the School Board as required by law.
12. Manage the development, conversion, and maintenance of business administrative management information systems for the District.
  13. Manage highly complex projects; provide staff assistance to the Superintendent's Cabinet, Budget Committee and Board in the development and implementation of financial, service and political strategies.
  14. Direct the financial functions of the District including payroll, accounting, general accounts receivable and payable, grants, student body accounts, cash management, and audit.
  15. Supervise the monitoring of the district's financial outlook and prepare the district's annual financial forecast, annual budget, supplemental budgets and ongoing revenue and expenditure projections.
  16. Provide information and counsel to District administrators regarding financial regulations, policies and goals and the implications of financial decisions.
  17. Oversee the financial aspects/functions of school finance positions and provide regular support to principals. Ensure school accounting is in compliance with applicable state and federal laws and District policy.
  18. Perform specialize financial or cost analysis research and analyze historical accounting transactions. Manage the accumulation and consolidation of financial data necessary for accurate forecasting of consolidated financial results.
  19. Administer the financial aspects of the district's contracts with charter schools.
  20. Support District representatives in employee collective bargaining, employee benefit and compensation administration by overseeing financial analysis relating to employment issues and participating on management bargaining teams.
  21. Work with external auditors, financial advisors, bond counsel, underwriters, and regulatory entities to address financial issues or capital financing.
  22. Conduct and oversee research; prepare reports on financial issues such as new revenue, strategic planning, and economic forecasts, recommends changes in policies and practices. Design financial models create and/or evaluate proposals for changes in operations.
  23. Review and recommend action on proposed and approved legislation and regulations related to school funding.
  24. Plan, direct and coordinate department work activities; assign projects and programmatic areas of responsibility; review and evaluate work methods and procedures; meet with key staff to identify and resolve problems.
  25. Make recommendations to establish appropriate service and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly.
  26. Select, supervise, and evaluate assigned staff; assign work and ensure appropriate training is provided; investigate complaints, recommend and administer disciplinary actions; manage sensitive personnel matters and recommend grievance responses.
  27. Make recommendations based on new developments in professional standards, legislation, and industry practices.
  28. Provide assistance and support for team members and projects as needed.

**Required Knowledge, Skills and Abilities**

Basic Skills: Background structures needed to work with and acquire more specific skills

Reading Comprehension	Understanding written sentences and paragraphs in work related documents.
-----------------------	---

Active Listening	Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
Writing	Communicating effectively in writing as appropriate for the needs of the audience.
Speaking	Talking to others to convey information effectively.
Mathematics	Using mathematics to solve problems.
Science	Using scientific rules and methods to solve problems.

Process Skills: Procedures that contribute to the more rapid acquisition of knowledge and skill

Critical Thinking	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
Active Learning	Understanding the implications of new information for both current and future problem-solving and decision-making.
Learning Strategies	Selecting and using training/instructional methods and procedures appropriate for the situation when learning or teaching new things.
Monitoring	Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.

Social Skills: Developed capacities used to work with people to achieve goals

Social Perceptiveness	Being aware of others' reactions and understanding why they react as they do.
Coordination	Adjusting actions in relation to others' actions.
Persuasion	Persuading others to change their minds or behavior.
Negotiation	Bringing others together and trying to reconcile differences.
Instructing	Teaching others how to do something.
Service Orientation	Actively looking for ways to help people.
Self Management	Managing one's own time.

Problem Solving Skills: Developed capacities used to solve problems in real-world settings

Basic Problem Solving	Identifying reoccurring problems and reviewing related information to evaluate options and implement solutions.
Complex Problem Solving	Identifying multi-faceted or unexplored problems and reviewing related information to develop and evaluate options and implement solutions.

Technical Skills: Developed capacities used to design, set-up, operate, and correct malfunctions involving application of machines or technological systems

Equipment Selection	Determining the kind of tools and equipment needed to do a job.
---------------------	---

Systems Skills: Developed capacities used to understand, monitor, and improve socio-technical systems

Judgment and Decision Making	Considering the relative costs and benefits of potential actions to choose the most appropriate one.
Systems Analysis	Determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes.
Systems Evaluation	Identifying measures or indicators of system performance and the actions needed to improve or correct performance, relative to the goals of the system.

Supervisory/Resource Management Skills: Developed capacities used to allocate resources efficiently

Time Management	Managing the time of others.
Financial Tracking	Accounting for these expenditures.
Manage Financial Resources	Suggest and implement how money will be spent to get the work done.
Financial Resources Oversight	Oversee the design, integration, and monitoring of how money will be spent.
Manage Material Resources	Obtaining and seeing to the appropriate use of equipment, facilities, and materials needed to do certain work.
Material Resources Oversight	Oversee the design, integration, and monitoring of how equipment, facilities, and materials will be used.
Management of Personnel Resources	Motivating, developing, and directing people as they work, identifying the best people for the job.

## Minimum Qualifications

### Education

- Master's degree in Finance or closely related field; and

### Experience

- Five (5) years of experience reflecting skills shown below. Three (3) years of the experience must have included supervision, resource proposals, planning and monitoring within a single operational or focus area.

Equivalency to the education and experience outlined above will also be considered:

An equivalent combination of education and/or experience equaling ten (10) years will be evaluated. However, there will be no substitution for the three (3) years of supervision of staff, project coordination, resource proposals, planning and monitoring within a single operational or focus area.

Specific preferences for types of experience, if any, will be identified at the time of recruitment. It is important to note that these are not qualification criteria. They are simply additional screening criteria that will be utilized to help determine the best candidates.

ADDITIONAL INFORMATION	
Employee Unit	Executive
Pay Grade	Director
Created by	Karen Hardin, Director of Human Resources
Approved by	Cydney Vandercar, Superintendent
Last Revised	April 18, 2022

This job description in no way states or implies that duties above are the only duties to be performed by this position. The administrator will be required to follow any other instructions and to perform any other related duties as assigned by the Superintendent and the Assistant Superintendent for Instruction.