



PERSONNEL COMMISSION

Class Code: 0689
Salary Range: 70 (M2)

CHIEF BUSINESS AND FINANCIAL OFFICER

JOB SUMMARY

Under direction of the Superintendent of Schools, plan, organize and direct the activities of the Financial Services and Business Services branches of the District; provide internal financial consulting services in support of District programs; oversee administration of a District annual budget of approximately \$650 million dollars.

EXAMPLES OF DUTIES

The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.

- Plan, organize, control, integrate and evaluate the work of the Financial Services and Business Services branches, with responsibility for Accounting, Audit, Budget, Information Technology, Payroll, Purchasing & Contracts, Records, Risk Management, Facilities, Maintenance, Food & Nutrition Services, Operations & Transportation divisions. **E**
- Provide internal consultation services and recommend financial and business policies to the Superintendent of Schools and Board of Education. **E**
- Implement and evaluate programs, plans, processes, systems and procedures to achieve District goals for business and financial services. **E**
- Provide support to District divisions, internal and external stakeholders in assessing the financial impact of legislation, ballot measures, negotiations and related matters; direct the analysis of impending legislation and recommend new and revised legislation language to assure business and financial services laws which enhance the District's educational mission. **E**
- Assure compliance with local, state and federal laws relating to school business functions, construction and reconstruction, financial accounting, and related activities. **E**
- Analyze, develop and review reports of findings, alternatives and recommendations involving a broad range of revenue, financing, business operations, financial planning and financial and business management issues; make presentations to District management, Board of Education, District employees, the general public and others on District financial and business status and operations. **E**
- Participate in collective bargaining negotiations and advise District administration regarding financially related issues and impacts. **E**

- Oversee preparation, administration and control of District budgets including general and special funds. ***E***
- Represent the District at local, state and national organization meetings and conferences relating to school business and financial management; represent the District in a variety of local community based organizations and coalitions to effect positive dialogue and relations in school business and financial matters. ***E***
- Supervise the performance of assigned personnel; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. ***E***
- Perform related duties as assigned.

Note: At the end of some of the duty statements there is an italicized "E" which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.

DISTINGUISHING CHARACTERISTICS

This single incumbent classification is responsible for managing, directing and integrating broad, comprehensive business and financial services for the school District. This senior management designated classification recommends business and financial policies to the Superintendent of Schools and Board of Education. This classification ensures integrity of the District's financial reports and solvency in accordance with state and federal law.

EMPLOYMENT STANDARDS

Knowledge of:

State, federal and local laws, regulations and court decisions applicable to school business operations and financial management.

Principles and practices of public administration, intergovernmental relations, school business operations and financial management.

Principles, practices, tools and techniques of statistical analysis and project management.

Principles, theories and practical application of construction and reconstruction bonds funding, federal special funding programs and grants and public agency budgeting techniques.

Principles and practices of negotiations and collective bargaining.

Techniques and principles of high-quality customer service, customer relationship management and internal consulting concepts and practices.

Principles and practices of effective leadership, management and supervision.

Ability to:

Plan, direct and integrate a broad range of complex business and financial planning, budgeting and service programs and activities.

Oversee preparation and monitoring of District budgets.

Analyze processes and problems, identify opportunities for improvement and follow through on changes, in a timely and consistent manner.

Communicate effectively and conduct and participate in meetings

Prepare and present complex data in written and oral reports, and represent the District in a variety of public settings.

Provide leadership by building, directing and motivating a diverse workforce at all levels in the organization.

Understand, interpret, apply and explain complex state and federal policy, law, regulation and court decisions applicable to school business and financial operations.

Provide internal consultation services for business and financial services to the Superintendent of Schools, Board of Education, and District departments.

Education and Training:

Bachelor's degree in Finance, Accounting, Business Administration, Public Administration, or related field is required. An MBA, MPA, or Master's in School Business Administration, and CPA or CMA licensure are highly desirable.

Experience:

Seven years of business or financial operation administration management experience in a full-service school District or a full-service municipal, State or Federal public agency with an annual budget of \$100 million or greater is required. At least three of these years must have been in a senior administrative management capacity, overseeing multiple business or financial operations functions and staff.

Master's degree in one of the above-identified fields may substitute for two years of the required experience.

Any other combination of training and experience which demonstrates the applicant is likely to possess the required skills, knowledge and abilities may be considered.

SPECIAL REQUIREMENTS

Positions in this classification require a valid California Class C driver's license.

An applicant for this classification will be required to obtain, at his/her own expense,

and submit his/her motor vehicle driving record at the time of appointment. The record must meet and be maintained at the District's safe driving standard. Failure to meet this requirement will result in the disqualification and/or rejection of the eligible regardless of any other standing.

WORKING ENVIRONMENT

Office environment.
Driving a vehicle to conduct work.

PHYSICAL DEMANDS

Hearing and speaking to exchange information and make presentations.
Dexterity of hands and fingers to operate a computer keyboard.
Seeing to read a variety of materials.
Sitting for extended periods of time.

AMERICANS WITH DISABILITIES ACT

Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

APPOINTMENT

In accordance with Education Code Sections 45100.5 and 35031 this classification is a part of the classified service and shall be afforded all rights, benefits and burdens of other classified employees, except that the incumbent shall be exempt from all provisions relating to obtaining permanent status in a senior management position. Positions are per contract, subject to renewal at negotiated intervals.

(Board Action 5/7/90 – Effective 7/1/90 designated as Senior Management Service)
Revised: 10/22/92
Revised: 3/25/04