

# DIRECTOR OF FINANCE & OPERATIONS SOUTH LANE SCHOOL DISTRICT



**REPORTS TO: SUPERINTENDENT**  
**WORK YEAR: 260 days**

## **JOB SUMMARY:**

The Director of Finance & Operations oversees all District financial and accounting operations, including budget preparation and adoption, district bank accounts, financial reporting, annual district audit, fixed asset inventory, monitoring and reporting of the District ADM, and district bonds. In addition, the Director is responsible for risk management, and for leading and managing the District's Food Services, Maintenance, and Transportation departments. In all of these areas, the Director will be tasked with managing the financial and operational resources of the District to enable the best possible educational services within the available resources.

## **LEADERSHIP QUALITIES:**

1. Committed to the pursuit of excellence; demonstrates a willingness to speak honestly, listen openly, and lead purposefully as a District leader and supervisor.
2. Committed to providing innovation and leadership towards reaching extraordinary results.
3. Engaging financial change agent striving for exceptional results in staff and student performance.
4. Personal and professional honesty and integrity with strong ethical and moral standards.
5. Visible in the schools and active in the South Lane community as well as the region's larger educational community.
6. Strong interpersonal skills – a team builder and a team player.
7. Innovative and creative problem-solving abilities, engaging others in decision-making, and willing to assume responsibility for decisions.
8. Strong supporter of all staff and students.
9. A strong work ethic.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

*Essential duties of this position include the following. Employees in this position perform some or all of the following tasks. Other duties may be assigned.*

1. Provides leadership and technical assistance for the District in the areas of finance, budgeting, construction management, contract negotiations, risk management, and the management of the business, food service, maintenance, and transportation departments.
2. Develops finance organizational strategies by contributing financial and accounting information, analysis, and recommendations to strategic thinking and direction; establishing functional objectives in line with organizational objectives.
3. Establishes finance operational strategies by evaluating trends; establishing critical measurements; determining production, productivity, quality, and customer-service strategies; designing systems; accumulating resources; resolving problems, implementing change.
4. Develops organization prospects by studying economic trends and revenue opportunities; projecting acquisition and expansion prospects; analyzing organization operations; identifying opportunities for improvement, cost reduction, and systems enhancement; Participates in developing a plan for capital improvements/expansion.

5. Develops financial strategies by forecasting capital, facilities, and staff requirements; identifying monetary resources and developing action plans to achieve District objectives.
6. Prepares and administers the annual budget.
7. Monitors expenditures by establishing effective and efficient procedures and controls.
8. Advises the superintendent, the Board of Directors and the District Budget Committee on business, financial questions and legislation that may impact the district.
9. Upholds and evaluates board policy as it relates to finance and business.
10. Develops funding structures that promote the District's mission, philosophy, and vision. Monitors community demographics, resources and emerging trends.
11. Cultivates relationships that enhance student learning and promote a strong communication of public support for the District.
12. Encourages innovations. Analyzes data to improve school operations. Serves as an information resource. Helps develop and implement the district's strategic plan.
13. Directs the operation of the Business Office which includes accounting, auditing, payroll, purchasing, construction, and investing activities.
14. May act as the boards' agent for signing authorized contracts.
15. Manages insurance programs (e.g., Property, liability, fleet, student, etc).
16. Assumes a key role in the employee contract negotiation process by providing advice and information regarding the District's financial status and the impact bargaining may have on the District's financial position
17. Assists and educates administrators and supervisors in managing department and school budgets. Provides advice on a wide range of financial matters.
18. Attends most School Board meetings; prepares and presents reports/responses related to the financial status of the District.
19. Follows and supports South Lane School District policies and procedures.
20. Maintains professional and technical knowledge by participating in professional development opportunities.
21. Performs other duties as may be needed.

#### **MINIMUM QUALIFICATIONS:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience:** Bachelor's Degree in Business Administration, Finance or Accounting and five (5) years of experience in managing and/or supervising the financial operations of a public entity (or any equivalent combination of education and experience). Preference for Certified Public Accountant. Understanding of Oregon's School Support Formula. ADM reporting, demonstrated skills in cash management, cash flow analysis, investments, and other money management skills. Experience in School Finance/Budget Development and Financial Planning and Reporting; and Payroll Accounting and Fringe Benefit Management. Working knowledge of current Oregon laws (including Oregon Local Budget Law), policies, administrative rules, and model programs related to Finance.
- **Interpersonal Skills:** Works well with others from diverse backgrounds. Focuses on solving conflict; maintaining confidentiality; and contributing to building a positive team spirit. Effective communication skills are essential for conflict resolution, training, and day-to-day management duties. Demonstrated ability to establish strong interpersonal relationships with District personnel and other agency staff and community members.

- **Language Skills:** Ability to communicate fluently verbally and effectively in writing in English. Ability to respond to common inquiries or complaints from parents, staff or members of the community. Ability to read and interpret documents. Ability to write routine reports and correspondence. Demonstrated ability to compose, produce clear, coherent professional documents and deliver professional presentations to various stakeholder groups
- **Reasoning Ability:** Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations. Able to read, understand and effectively train others in departments standards and guidelines.
- **Computer Skills:** Ability to proficiently use the following programs strongly preferred: MS Word, Excel, email internet applications and Google Apps. Ability to learn and efficiently use the District's financial accounting software.
- **Other Skills and Abilities:** Ability to appropriately communicate with diverse staff and others including vendors and other agencies. Ability to exercise good judgment and work in an environment with frequent interruptions.

Certificates, Licenses, Registrations: Certificates as determined by the District including a valid Oregon Driver License.

**EVALUATION:**

Performance of this job will be evaluated annually or as needed.

**PHYSICAL REQUIREMENTS:**

Ability to perform the requirements of this job description and the assigned duties with or without reasonable accommodation. Within a typical workday, the employee may be required to perform any combination of the following:

1. In an eight-hour day, the employee may:
  - a. Stand/walk 4-8 hours
  - b. Sit 4-8 hours
  - c. Use voice 7-8 hours
  - d. Utilize computer 2-8 hours
  
2. The employee may on a daily basis:
  - a. Bend, kneel, squat, reach
  - b. Climb stairs
  - c. Use hands for repetitive motions, including single grasping, fine manipulation, and pushing/pulling a maximum of 40 pounds
  - d. Drive between District facilities for meetings

**MENTAL REQUIREMENTS:**

Ability to reason logically and make sound decisions, to consider alternative and diverse perspectives, to communicate effectively both orally and in writing, to remain poised under all circumstances, to interact effectively with people in a positive manner that engenders confidence and trust, and must be able to adapt to work pressures that can include frequent interruptions, quick responses, and multiple tasks.

**WORKING CONDITIONS:**

The employee works with groups of staff and students, and on a one-on-one basis. The working conditions are that of a typical office atmosphere and/or school building.

Occasional travel between District buildings is required; occasional travel to area districts or ESDs for meetings and conferences should be anticipated.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee may regularly perform work beyond a standard 40-hour work week when work-load requires.

The work environment varies and includes standard office, school buildings and school grounds settings. The noise level in the work environment is usually low to moderate.

The District complies with the Americans with Disabilities Act by providing reasonable accommodations, as necessary, to allow disabled applicants and employees to perform the essential functions of this job.

**AN EQUAL OPPORTUNITY EMPLOYER**

South Lane School District is an Equal Opportunity Employer and does not discriminate on the basis of race, color, religion, gender, national origin, disability, parental or marital status, age, or genetic information. Reasonable accommodations for the application and interview process will be provided upon request and as required in accordance with the Americans with Disabilities Act of 1990 (ADA) and the ADA Amendments Act of 2008 (ADAAA). Disabled persons may contact Human Resources at (503) 825-5000 for additional information or assistance. Speech/Hearing impaired persons may contact the District for assistance through the Oregon Relay at (800) 735-2900.

**OTHER:**

**Note:** This is not necessarily an exhaustive or all-inclusive list of responsibilities, skills, duties, requirements, efforts, functions or working conditions associated with the job. This job description is not a contract of employment or a promise or guarantee of any specific terms or conditions of employment. The school district may add to, modify or delete any aspect of this job (or the position itself) at any time as it deems advisable.

Director of Finance & Operations: I have read and understand this job description. My signature acknowledges that I am capable of performing the essential functions of this position with or without reasonable accommodations.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employee Printed Name: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Printed Name: \_\_\_\_\_