

## **DIRECTOR OF BUSINESS AND FISCAL SERVICES**

### **JOB SUMMARY**

Under administrative direction of the Assistant Superintendent of Business Services, the Director plans and directs the District's fiscal services operation through administrative oversight to ensure the performance and legal compliance of all critical professional finance, budgeting, accounting, payroll, and related fiscal matters.

### **DISTINGUISHING CHARACTERISTICS**

The Director of Business and Fiscal Services is assigned to exercise a high degree of independent judgment, oversight, and leadership in complex fiscal matters for the District.

### **SUPERVISION RECEIVED AND EXERCISED**

The Director of Business and Fiscal Services receives supervision from and is evaluated by the Assistant Superintendent of Business Services. The Director provides direct supervision to the Accounting, Finance, Budget, and Payroll staff.

### **EXAMPLES OF DUTIES** – Duties may include, but are not limited to, the following:

- Advises and makes recommendations to the Board of Trustees, Superintendent, Cabinet, Assistant Superintendent of Business Services, and Management regarding fiscal matters and business solutions.
- Oversees the preparation, creation, maintenance, and reporting of District budget information in compliance with State fiscal standards for the Assistant Superintendent and Board of Trustees;
- Analyzes complex information from the Governor's budget and incorporate information into the District budget;
- Analyzes operational costs to develop data and statistics for budgeting and administrative purposes and make recommendations;
- Develops projections on District revenue and expenses based on complex variables and applicable fiscal standards;
- Performs highly technical financial and statistical research analysis pertaining to the District's fiscal position, and other matters pertaining to budget planning and control;
- Develops and maintains proper internal controls to protect the integrity of fiscal systems.
- Coordinates audit planning, preparation, and direct interaction with auditors during the audit process;
- Advises in the development process of staffing formulas for administrative, certificated, and classified staffing levels and analyzes the fiscal impact of implementing such formulas;
- Performs complex analyses associated with District projects and activities that are funded through debt obligations and other sources of revenue and makes recommendations to the Superintendent and Assistant Superintendent of Business Services;
- Oversees and monitors the preparation of payroll for certificated and classified employees along with State and Federal reporting requirements and serves as Custodian of Records of the student body accounts;

- Oversees preparing actuarial assessments of the value of the District's land and buildings, insurance benefit programs, and retirement and pension obligations;
- Oversees the collection, monitoring and analysis of data related to enrollment, class size, debt, building development, and housing projects;
- Gathers, evaluates, and makes recommendations concerning the interpretation of facts and data related to demographic data, asset values, attendance rates, and enrollment data;
- Provides professional development and coaching to staff involving the implementation of programs, projects, services, and objectives related to Business Services which includes training for staff;
- Directs and supports the planning, organizing, and supervision of activities of assigned staff;
- Participates as a member of both certificated and classified negotiating teams.
- Provides written and oral reports to the Board of Trustees and District staff;
- Performs other related duties as needed.

### **EMPLOYMENT STANDARDS**

Any equivalent combination of training, education and experience that demonstrates the applicant is likely to possess the required knowledge, skill and ability to perform the job duties:

**Education:** Bachelor's Degree in Business Administration, Accounting, Financial Management, Public Administration, or related field. An advanced degree and /or CPA or Chief Business Official certificate is highly desirable, preferably with specialization in public school finance.

**Experience:** Five (5) years of progressively responsible professional accounting and financial management experience, including at least two (2) years supervisory responsibility for administering a fiscal program including accounting, payroll, budget preparation, and control.

### **Knowledge of:**

- Budgeting, accounting, fiscal procedures and methods;
- Financial analysis and research procedures;
- Internal/external audit procedures;
- Legal provisions and requirements involved in the monitoring and accounting of school funds;
- Principles and practices of employee training and supervision;
- Modern office methods, procedures, terms, and equipment, including a working knowledge of the use of personal computers, word processing, spreadsheet, database, email and internet computer applications;

### **Ability to:**

- Direct the accounting/budget operations program of a school district;
- Administer specific school district budget accounting and fiscal procedures;
- Comprehend technical purchasing specifications and requirements;
- Interpret laws, rules, and regulations;
- Instruct, train, and effectively supervise clerical, technical, professional, and supervisory personnel in fiscal services operations;
- Evaluate and coach the work of others.

- Develop and maintain harmonious and effective working relations with school officials, other employees, and the public;
- Plan, organize and prioritize work to meet schedules and timelines;
- Assimilate and evaluate complex data and prepare sound recommendations;
- Prepare clear and concise financial reports;
- Communicate effectively in writing, orally, in person, and on the telephone.
- Operate various office equipment, including data and word processing software programs;

**License:**

- Possession of a valid Class C California Driver's License.

**PHYSICAL STANDARDS:**

The work environment and physical demands of the position, as described below, are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals to perform the essential functions of this position.

**Work Environment:** The incumbent works in an office environment. The incumbent has direct contact with the public, students, and other employees in person and through telephone, electronic mail, and other written communications, requiring the ability to effectively manage a high volume of work despite frequent interruptions. Some interactions resulting from these contacts can result in stressful situations that are a regular part of the work environment.

**Physical Demands:** Primary functions of the position require sufficient physical ability and mobility to work in an office setting as follows: to stand and walk for extended periods of time; to twist at the neck and trunk; to bend at the waist, stoop, and kneel; to see, with or without correction, within normal visual range in addition to possessing specific vision abilities required by this job; to hear within the normal audio range with or without aide; to communicate orally and in writing in order to exchange information with others. Regular physical attendance at work is an essential requirement of this job classification. In addition, operation of a motor vehicle with a valid Class C Driver's License.

*The information contained in this physical standards description is for compliance with ADA and is not an exhaustive list of duties performed. The individuals in this job perform additional duties and additional duties may be assigned.*

Director of Business and Fiscal Services Personnel Action	Personnel Action Date
Adopted by the Personnel Commission:	5/25/2021