



JOB DESCRIPTION CHIEF BUSINESS OFFICER



Reports to:	Superintendent	Employment Group / Salary Range:	Management
Dept:	Fiscal	FLSA:	Exempt
Annual Work Days:	261	Formal Review Date: Board Approval Date:	April 29, 2025 June 9, 2025

PRIMARY FUNCTIONS

Under the general direction of the Superintendent, serve as the chief business officer of the District to plan, organize and direct all district wide functions related to business services, fiscal services, budget, accounting, payroll, accounts payable, accounts receivable, facilities, maintenance, home-to-school transportation, food services, property/liability, contract management, competitive bidding, purchasing, warehouse, and supervise and evaluate the Directors and support staff of these functions, and other related areas.

ESSENTIAL DUTIES & RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

- Plan, organize, direct, and coordinate the activities and operations of Business Services
- Maintain fiduciary responsibility to the Board of Education by managing District revenues, expenditures, assets (property and fiscal), debts (short-term and long-term), and cash flow to ensure the overall financial and fiscal integrity of the District
- Serve as a resource person for administrative staff, Board of Education, District negotiating team, special District committees, employee groups, school connected organizations, and the general public as necessary
- Supervise student insurance program and evaluate contracts with providers and third party administrators
- Provide property and liability coverage for the District and work with legal counsel to defend the District
- Participate as a member of the District's team in the collaborative interest based collective bargaining process

- Review, analyze and certify, if appropriate, all public disclosure documents related to collective bargaining and debt issuance, in compliance with AB 1200 regulations
- Utilize an inclusive process for budget development
- Manage the preparation of the annual budgets for all the district funds, including details of income and expenditures
- Forecast and monitor property tax collections
- Provide comprehensive review of Criteria & Standards and technical review of Annual and Interim Budget Reports for submission to the Board and oversight agencies
- Provide regular and comprehensive financial reports to the Board of Education and stakeholders
- Maintain strong fiscal practices and oversight with provisions for appropriate reserves
- Oversee accounting practices that ensure employees and vendors are paid accurately and timely, in accordance with District policy and applicable laws and regulations
- In addition to legality, consider appropriateness of District expenditures based on the nature of public funding, accountability, and effectiveness,
- Provide analytical review and analysis of the allocation and application of District resources
- Strengthen and maintain strong internal controls
- Facilitate annual financial and compliance audits and implement recommendations, if any, in a timely manner
- Review and prepare required financial reports and auditing functions in accordance with federal, state, and local law
- Manage developer fee agreements, general obligation bonds, and community facilities district
- Advocate for Basic Aid funding
- Maintain membership in organizations and attend meetings and workshops providing critical updates and opportunities for input on current issues that may have a fiscal impact on the District
- Research, communicate and implement changes related to Governmental Accounting Standard Board (GASB) issued statements
- Prepare and recommend approval or denial of inter-district transfers based on Board policy
- Identify and advise on risk assessment of current or proposed District actions and issues

- Oversee annual revision and present a five-year Deferred Maintenance Plan
- Direct compliance with National School Lunch Program (NSLP) and facilitate audits and implementation of recommendations
- Cultivate continuous improvement in food service program
- Keep informed on pending legislation that affects business operations
- Administer and interpret statutes, regulations, and policies involving the legal responsibilities of business services
- Foster the principles of professional learning communities (PLC) to align services and District goals
- Supervise and coordinate the activities of directors of Fiscal and Food Services
- Participate in the selection, supervision, training and evaluation of staff
- Represent the District in collaborative projects with parent groups, community organizations, county, state, and federal agencies
- Maintain continuing professional education for professional certifications

QUALIFICATIONS

Education and Experience:

Bachelor's degree in business administration, public administration or a related field from an accredited college or university and/or a FCMAT, CASBO OR CBO Certificate or Professional Designation

A minimum of 3 years of progressively responsible experience (preferably in a school agency, in accounting, finance, business administration, management and/or supervision of school business operations

Licenses, Certificates and Other Requirements:

- Valid CA Drivers License
- Maintain Auto Insurance

KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Planning, organization, and management of the district's business services department.
- Methods and practices of school financing.
- California Education Code sections pertinent to school finance, facilities, including facilities services and maintenance.
- Principles of budgeting analysis, accounting, statistics, budget analysis, preparation, and control.
- Generally Accepted Accounting Principles.

- Governmental accounting and fiscal management functions.
- Data sources and information pertinent to financial planning.
- Applicable laws, codes, regulations, policies, and procedures.

Assistant Superintendent Business Services

- Principles and practices of administration, supervision, and training.
- Processes, procedures, and organizational management of facilities and maintenance and operation, including construction.
- Procedures and processes for purchasing and warehousing.
- Food service processes and procedures including regulations and rules governing the federal free and reduced lunch program.
- Rules, regulations, and applicable laws pertaining to student records and enrollment.
- Interpersonal skills using tact, patience, and courtesy

Skills and Abilities to:

- Plan, organize, and administer the district's business services functions.
- Interpret and administer policies and directives.
- Analyze, interpret data and make projections.
- Research, prepare, and present clear, concise, and comprehensive reports.
- Interpret, apply and explain rules, regulations, policies and procedures.
- Establish and maintain cooperative and effective working relationships with others.
- Train, supervise and evaluate staff.
- Analyze situations accurately and adopt an effective course of actions.
- Make informed decisions and recommendations on a wide variety of business matters.
- Operate of a computer and assigned software.
- Work independently with little direction.
- Plan, prioritize and organize work.
- Meet timelines and adhere to schedules.
- Maintain confidentiality of sensitive and privileged information.
- Direct the maintenance of a variety of reports, records and files related to assigned activities.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Physical Demands:

While performing the duties of this class, employees are regularly required to talk or hear, in person and by telephone; sit, walk and stand; use hands to finger, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is frequently required to lift up to 30 pounds.

Mental Demands:

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; use math and mathematical reasoning; observe and interpret people and situations; learn and apply new information and skills; perform highly detailed

work; work on multiple, concurrent tasks.

WORKING ENVIRONMENT

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

Employees work under typical office conditions subject to frequent public contact and interruption and to intermittent exposure to individuals acting in a disagreeable fashion.

The employee may be required to travel to locations other than the assigned work site and to adjust to work schedule changes and requirements to work overtime.

EMPLOYEE CERTIFICATION OF JOB DESCRIPTION

I hereby acknowledge I have read and understand the content of this job description. I have had the opportunity to ask questions and have those questions answered about the general duties and responsibilities of this job. I understand that the job description may be revised from time to time in the future by the Patterson Joint Unified School District Governing Board in consultation with my professional association as needed and where applicable.

I understand and agree nothing in this job description should be construed as a contract of employment. My employment with the Patterson Joint Unified School District is contingent upon execution of a signed contract approved by the board of trustees. Continued employment is subject to my adherence to board policy, state and federal laws, the collective bargaining agreement between my association and the district where applicable, and my performance evaluation.

I further acknowledge that it is my responsibility to notify my supervisor immediately in the event I may need reasonable accommodations to perform the primary functions, general duties and responsibilities, or the physical, mental and social requirements of this job.

Employee Signature

Date

Name Printed