



## **EXECUTIVE DIRECTOR, DISTRICT BUSINESS SERVICES**

### **DEFINITION**

Under general direction, plans, organizes, controls, and directs the allocation of departmental resources to ensure fiscal compliance of San Mateo County school districts; establishes directional focus for the district fiscal support and payroll audit units and assigned staff; coordinates distribution of financial, payroll, and fiscal information to school districts ensuring timely and accurate financial data is submitted to the appropriate governmental organization in accordance with local, state, and federal reporting guidelines; and performs related duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives administrative direction from the Deputy Superintendent of Business Services. Exercises direct supervision over supervisory, professional, technical, and administrative support staff through subordinate levels of supervision.

### **CLASS CHARACTERISTICS**

This is a department director classification that oversees, directs, and participates in all activities of the District Business Services department, including short- and long-term planning as well as development and administration of department policies, procedures, and services. This class provides assistance to the Deputy Superintendent in a variety of administrative, coordinative, analytical, and liaison capacities. Successful performance of the work requires knowledge of public policy, Office functions and activities, including the role of the Board of Education, and the ability to develop, oversee, and implement projects and programs in a variety of areas. Responsibilities include coordinating the activities of the department with those of other departments and outside agencies and managing and overseeing the complex and varied functions of the department. The incumbent is accountable for accomplishing departmental planning and operational goals and objectives, and for furthering the Office's mission, goals, and objectives within general policy guidelines.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Plans, organizes, controls, and directs the allocation of departmental resources to ensure fiscal compliance of school districts; coordinates distribution of financial, payroll, and fiscal information to school districts ensuring timely and accurate financial data is submitted to the appropriate governmental organization in accordance with local, state, and federal guidelines.
- Develops, directs, and coordinates the implementation of goals, objectives, policies, procedures, and work standards for the department.
- Selects, trains, motivates, and directs department personnel; evaluates and reviews work for acceptability and conformance with department standards, including program and project priorities and performance evaluations; collaborates with employees on performance issues; implements discipline and termination procedures; responds to staff questions and concerns.
- Contributes to the overall quality of the department's service by developing, reviewing, and

implementing policies and procedures to meet legal requirements and Office needs; continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of change.

- Provides technical expertise to internal departments, school districts, charter schools, county offices of education, the Department of Education, Fiscal Crisis and Management Assistance Team (FCMAT) and others; analyzes ledgers postings, revenue projections, financial spreadsheets, and other documents and provides assistance in the completion of district financial activity as needed; approves and/or prepares board letters approving financial conditions of school districts.
- Provides resources, information, and data to school districts as requested; contacts state agencies, local agencies, or other external resources to provide the information necessary to the school district or charter school in a timely manner.
- Coordinates, conducts, and attends workshops/training sessions and various meetings; compiles materials, determines effective methods of distributing information, and collaborates with staff and administrative support to provide handouts and related information.
- Coordinates and directs the resolution of issues related to California Public Employees Retirement System (PERS) and State Teachers Retirement System (STRS) retirement reporting and quarterly/annual payroll tax reporting between agencies and the Payroll Manager, Districts, and Director, District Business Services.
- Supports the implementation, usage, improvement, communication, and training related to the County-wide financial Enterprise Resource Planning (ERP) software program; coordinates with appropriate vendors to ensure optimal usage and organizational needs are met.
- Maintains current knowledge of trends, practices, and local, state, and federal programs, laws, codes, regulations, and pending legislature related to assigned activities; directs the modification of functions, policies, and procedures to meet local, state, and federal requirements as appropriate; provides leadership and direction in developing new and innovative services.
- Conducts a variety of departmental organizational and operational studies and investigations; recommends modifications to programs, policies, and procedures as appropriate.
- Prepares, reviews, and presents staff reports, various management and information updates, and reports on special projects as assigned by the Deputy Superintendent, Business Services.
- Maintains and directs the maintenance of working and official departmental files.
- Ensures staff observe and comply with all Office and mandated safety rules, regulations, and protocols.
- Performs related duties as required.

## **QUALIFICATIONS**

### **Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

#### **Education:**

- Equivalent to the completion of a bachelor's degree from an accredited college or university with major coursework in business administration, public administration, or a closely related field.

#### **Experience:**

- Five (5) years of increasingly responsible experience in business services or school business accounting and two (2) years of supervisory experience.

### **Licenses and Certifications:**

- Some positions may require possession of a valid California Driver's License and a satisfactory driving record to be maintained throughout employment.

**Knowledge of:**

- Organization and management practices as applied to the development, analysis, and evaluation of programs, policies, and operational needs of the assigned area of responsibility.
- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.
- Administrative principles, practices, and methods including goal setting, program development, implementation and evaluation, policy and procedure development, quality control, and work standards.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Planning, organization, and direction of the allocation of departmental resources to ensure fiscal compliance of Office school district revenue limit projection and charter school funding.
- Accounting practices of school finance.
- State Teachers Retirement System (STRS) and California Public Employees Retirement System (PERS) reporting requirements.
- Principles and practices of long range and strategic planning in an educational setting.
- Budget development, administrative practices, and general principles of risk management related to the functions of the assigned area.
- Principles and practices of record keeping.
- Applicable federal, state, and local laws, codes, and regulations as well as industry standards and best practices pertinent to the assigned area of responsibility.
- Mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Office staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

**Ability to:**

- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.
- Develop and implement goals, objectives, practices, policies, procedures, and work standards.
- Provide administrative, management, and professional leadership for the District Business Services Department.
- Develop and monitor budgets and effectively utilize resources.
- Delegate authority and responsibility.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Establish directional focus for the district Fiscal Support and Payroll Audit units and assigned coordinators.
- Coordinate distribution of financial, payroll, and fiscal information to school districts ensuring timely and accurate financial data is submitted to the appropriate governmental organization in accordance with local, state, and federal reporting guidelines.
- Ensure compliance with PERS/STRS reporting and quarterly/annual payroll taxes.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the Office in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with

individuals.

- Prepare clear and concise reports, correspondence, documentation, and other written materials.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.

### **PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

### **ENVIRONMENTAL CONDITIONS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing divisional policies and procedures.