

ONTARIO-MONTCLAIR SCHOOL DISTRICT

CLASS SPECIFICATION State and Federal Program Coordinator

GENERAL PURPOSE

Under the direction of the Chief Financial Officer, plans, organizes, controls, integrates and directs the District's financial, accounting activities and program compliance responsibilities related to State, Federal and various District programs; provides support for the preparation, implementation and evaluation of the district's Local Control and Accountability Plan; performs a full range of financial and budget analyses in the preparation and maintenance of the District's financial records, reports and systems; manages and monitors assigned staff; provides a basis for sound operational and financial planning through financial review, analysis, monitoring, reconciliation and maintenance of assigned financial accounts, programs, and activities; carries out duties necessary to assure a sound fiscal operation; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

The Program Fiscal Services Coordinator is responsible for a high level, complex financial services for the District, including preparation of Federal and State financial reporting and compliance with Federal and State programs; assists in the preparation of the budget and monitors funding streams related to District programs and the Local Educational Agency Plan; evaluates and monitor expenditures related to supplemental and concentration funding intended to increase and improve services for targeted students; train, supervise and evaluate the performance of assigned staff; evaluate and monitor expenditures related to federal, state and various District programs; Manage and supervise assigned finance functions such as associate student body accounting; establish and revise program accounting procedures, conduct accounting analysis and prepare financial reports; conduct audits of District programs; meet expected timelines: and to do related work as required.

ESSENTIAL DUTIES AND 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. There will typically be an assigned schedule for these duties

1. Develops, integrates, implements and monitors work programs, policies and processes to achieve District strategic and business plans, goals and performance measures; participates in development of and monitors performance against the department's and District's budget.
2. With other members of the management team, participates in the development of District strategic plans and initiatives; develops and implements department business plans, work programs, processes, procedures and policies required to achieve strategic initiatives and overall departmental results in alignment with District objectives and priorities.
3. Provides leadership and participates in programs and activities that promote a positive employee relations environment.
4. Plans, organizes, directs and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with federal, state and local laws and regulations, District human resources policies and procedures and labor contract agreements.

5. Plans, organizes, directs and oversees the District's fiscal compliance and reporting of Federal and State programs, including but not limited to the goals identified in the District's Local Control and Accountability Plan; enforces and explains budget processes, policies and procedures; reviews, analyzes and develops recommendations regarding budget requests and other issues; prepares and delivers or oversees the preparation and delivery of budget presentations, which include highly sensitive and confidential information to senior management and the Board; negotiates and resolves sensitive or complex budget disputes; maintains controls over program expenditures.
6. Conducts or manages and directs the completion of financial planning activities and analyses, involving complex specialized and technical data; creates or directs creation of financial forecasting models and provides guidelines for future program spending consistent with State and/or Federal regulations; Prepares the consolidated application for State and Federal program financial reporting and monitors compliance with funding source guidelines and requirements; analyzes and determines the impact of economic and legislative changes on the District's financial programs and plans; provides assistance and expertise to other departments in financial planning for programs authorized by the Board.
7. Plans, organizes, manages and directs the District's general accounting activities and operations related to Federal, State and District specific programs; directs maintenance of records to ensure such records are accurate, up-to-date, complete and in compliance with all appropriate standards, laws, rules, regulations and policies; plans and directs the operation and implementation of financial controls for the billing, receipt and accounting for funds from grants and other sources; ensures proper accounting and compliance for all expenditures and revenues in accordance with GAAP, State and Federal audit guidelines.
8. Plans and directs the preparation of financial and management reports prepared for District departments, the Board, senior management and other governmental and regulatory bodies; identifies and communicates issues important to the District and provides findings and recommendations, which are often based on interpretations of complex regulations, laws and guidelines, including recommendations to improve the financial performance of the District and to improve educational services to students;
9. Provides expertise, guidance and assistance to staff, senior management, other District personnel and external customers; evaluates specialized information and data and provides decisions and recommendations on a wide array of financial and educational program matters; advises on availability of funds for long-term projects; directs and manages implementation of training programs for the District in financial and program compliance matters; understands, enforces, interprets and explains complex regulations, laws and guidelines.
10. Directs and participates in identification of financial areas that require process improvement; oversees development, integration and implementation of new or revised policies, processes, standards and internal controls for the Fiscal Services department.
11. Directs and oversees coordination of departmental activities with external auditors for the annual audit and the Fiscal Program Monitoring process.
12. Serves as the chairperson or as a member of various District and/or County advisory committees and serves as a liaison to federal and state departments of education.
13. Participates in the selection of fiscal services personnel.

QUALIFICATIONS

Knowledge of:

1. Knowledge and experience with categorical programs and categorical program budgeting.
2. Federal and State laws as they pertain to educational policy and procedures.

3. Principles and practices of general, fund, and governmental accounting
4. Internal control and audit principles and practices.
5. Principles and practices of public agency budgeting.
6. Laws and regulations relating to the financial administration of public school districts.
7. District functions and associated financial management issues.
8. Principles and practices of business data processing particularly related to the processing of program management and accounting.
9. Principles and practices of public administration, including purchasing and contracting and the maintenance of public records.
10. Principles and practices of sound business communication.
11. Research methods and analysis techniques.
12. Principles and practices of management and supervision.
13. District classified human resources policies and procedures and labor contract provisions.

Ability to:

1. Provide leadership to administrators, supervisors, principals and teachers.
2. Plan, organize, manage and integrate the District's finance and accounting activities and operations to meet District objectives, professional standards and legal requirements.
3. Define issues, analyze problems, evaluate alternatives and develop sound, independent conclusions and recommendations in accordance with laws, regulations, rules and policies.
4. Analyze and make sound recommendations on complex financial data and operations.
5. Understand, interpret, explain and apply District policies and state and federal laws and regulations applicable to District financial accounting, reporting and record keeping.
6. Evaluate financial programs, procedures and controls and implement recommendations for improvements.
7. Perform complicated mathematical calculations and analyses.
8. Prepare clear, concise and comprehensive financial statements, reports and written materials.
9. Exercise sound independent judgment within general policy guidelines.
10. Exercise tact and diplomacy in dealing with sensitive, complex and confidential issues.
11. Establish and maintain effective working relationships with Board members, all levels of District management, staff, County management and staff, representatives of other governmental agencies, external auditors and others encountered in the course of work.

Education, Training and Experience:

Graduation from a four-year college or university with a major in accounting, business administration, public administration or a closely related field; and at least two years' experience working with categorical programs. A Master's degree is desired, but not required.

Licenses; Certificates; Special Requirements:

A Certified Public Accountant (CPA), Master of Public Administration (MPA), Master of Business Administration (MBA), or California Administrative Services Credential is preferred, but not required.

A valid California Class C driver's license, a good driving record, and the ability to maintain insurability under the District's vehicle insurance policy.

PHYSICAL AND MENTAL DEMANDS

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

Physical Demands

While performing the duties of this class, an employee is regularly required to sit; talk or hear, in person, in meetings and by telephone; use hands to finger, handle, feel or operate standard office equipment; and reach with hands and arms. The employee is frequently required to walk and stand.

Mental Demands

While performing the duties of this class, the employee is regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve problems; observe and interpret people and situations; use math and mathematical reasoning; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks with constant interruptions; work under intensive deadlines and interact with Board members, all levels of District management, staff, County management and staff, representatives of other governmental agencies, external auditors and others encountered in the course of work.

WORK 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 individuals with disabilities to perform the essential functions.

The employee works under typical office conditions, and the noise level is usually quiet.

Board Approved 1/23/2014