

## CHIEF FINANCIAL AND TRANSPORTATION OFFICER

### **DEFINITION:**

Under the general direction of the Executive Director of Administrative Services, the Chief Financial and Transportation Officer is a senior district leader responsible for executive oversight of transportation services and chief financial leadership functions. This position integrates operational leadership equivalent to a Transportation Director with Chief Financial Officer responsibilities, including budget development, fiscal oversight, and financial accountability, and provides strategic leadership across transportation, budget, fiscal services, and purchasing. The role works collaboratively with Administrative Services in payroll, leaves, benefits, position control, and personnel services, and strengthens alignment, accountability, and connectedness across systems through disciplined improvement science, efficiency identification, and long-term planning.

### **QUALIFICATIONS:**

A combination of education and/or experience that provides the required knowledge, skills, and abilities to perform the essential functions of the position. Additional experience, as outlined below, may be substituted for required education on a year-for-year basis. A typical combination includes:

#### **Experience:**

- Minimum of five (5) years of experience as an Accounting Manager, Chief Fiscal/Business Officer, or other senior level leadership role with a school district or public agency. Experience applying improvement science or continuous improvement practices preferred. Demonstrated commitment to equity, collaboration, and accountability.

#### **Education:**

- Equivalent to Bachelor's degree from an accredited college or university, preferably in finance, accounting, business administration, public administration, or a related field. A specialization in accounting or business administration is preferred. An advanced degree from an approved institution is preferred.

### **DISTINGUISHING CHARACTERISTICS:**

The Chief Financial and Transportation Officer is a Cabinet-level leader who embeds the district's Leadership Collective Commitments into fiscal and transportation systems through strategic decision-making, disciplined improvement science, and shared accountability. The role prioritizes care for people by supporting safe, equitable, and effective services for students, staff, and families, while building trust and alignment across departments, school sites, and labor partners. This position ensures district resources and transportation services operate with discipline, sustainability, and strategic intent in service of student success.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES OVER FISCAL SERVICES DEPARTMENT:**

- Provide executive leadership integrating districtwide fiscal strategy and transportation operations to ensure long-term organizational sustainability, safety, equity, and alignment with district priorities.
- Lead the development, implementation, and oversight of the district's annual and multiyear budgets, integrating enrollment, attendance, LCFF, and other revenue assumptions into financial planning and decision-making.
- Direct ongoing budget monitoring, forecasting, and scenario analysis to identify fiscal risks, assess tradeoffs, and support timely executive and Board actions.

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- Oversee fiscal services functions, including accounting, accounts payable, purchasing, and related compliance activities, ensuring accuracy, transparency, and adherence to applicable laws, regulations, and standards.
- Maintain strong internal controls, audit readiness, and financial reporting practices by establishing systems and processes that support accountability, accuracy, and timely disclosure.
- Use financial data, forecasts, and performance metrics to inform district strategy, resource allocation, and Board decision-making, translating complex fiscal information into clear, actionable guidance.
- Collaborate with Administrative Services to align budget development with staffing assumptions, payroll, benefits, leaves, position control, and personnel services, ensuring consistency between fiscal and human resource systems.
- Lead long-term fiscal planning by evaluating cost drivers, staffing models, and system design to identify efficiencies and mitigate fiscal risk while maintaining service quality and equity.
- Apply disciplined improvement science to fiscal systems by engaging teams closest to the work, testing solutions, refining processes, and scaling effective practices that improve efficiency and accuracy.
- Establish, monitor, and report fiscal performance targets and dashboards to assess progress, identify gaps, and drive continuous improvement across financial operations.

### ESSENTIAL DUTIES AND RESPONSIBILITIES OVER TRANSPORTATION DEPARTMENT:

- Provide executive leadership equivalent to a Transportation Director by directing all district transportation services, ensuring safe, reliable, and equitable access for students.
- Oversee general education and special education transportation operations, ensuring compliance with safety standards, service requirements, and regulatory obligations.
- Ensure transportation services are delivered within fiscal, staffing, and operational constraints while maintaining service reliability, equity, and student safety.
- Lead transportation staffing, training, certification, and workforce development strategies to ensure operational readiness, compliance, and long-term capacity.
- Oversee routing efficiency, eligibility practices, service standards, cost controls, and vendor coordination, aligning transportation models to district capacity and accountability expectations.
- Use operational data and performance metrics to monitor on-time performance, safety, efficiency, and customer service, driving continuous improvement in transportation operations.
- Lead long-term transportation planning by evaluating service models, staffing structures, and operational practices to improve sustainability and adapt to projected conditions.
- Apply disciplined improvement science to transportation systems by engaging staff closest to the work, testing operational improvements, and scaling practices that strengthen service quality and efficiency.
- Strengthen coordination and connectedness between transportation services, school sites, and central departments through clear communication, responsive support, and aligned systems.
- Lead, coach, and mentor transportation leaders and supervisors, building leadership capacity, supporting succession planning, and ensuring accountability for results while maintaining high expectations.

### KNOWLEDGE:

- Comprehensive knowledge of school district finance, including budget development, multiyear financial planning, LCFF, enrollment and attendance impacts, reserve requirements, fiscal solvency standards, and long-term sustainability.

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- Thorough knowledge of public sector accounting, including internal controls, audit requirements, financial reporting practices, purchasing, accounts payable, and fiscal compliance applicable to public education agencies.
- Comprehensive knowledge of school transportation systems, including general and special education transportation, routing models, service eligibility, vendor coordination, safety standards, staffing models, certification requirements, and regulatory compliance.
- Knowledge of district operational systems and the interdependencies among fiscal services, transportation, human resources, and administrative services.
- Knowledge of improvement science and continuous improvement frameworks as applied to large-scale public sector and educational systems.

### ABILITIES AND SKILLS:

- Exercise executive judgment by balancing fiscal responsibility, operational feasibility, safety, equity, and organizational impact.
- Strategic direction and translate district priorities into aligned fiscal and transportation systems.
- Anticipate and mitigate fiscal and operational risk through proactive planning, system design, and continuous monitoring.
- Oversee large-scale operational systems, including transportation services, while maintaining safety, reliability, and service quality.
- Establish and monitor performance metrics and dashboards to assess progress, identify gaps, and drive corrective action.
- Design, implement, and sustain systems that promote accuracy, efficiency, accountability, and continuous improvement.
- Build trust and shared accountability across departments, school sites, and leadership teams.
- Hold self and others accountable while assuming best intentions, maintaining high expectations, and modeling professionalism.
- Remain coachable and promote professional growth, modeling continuous learning and improvement.
- Integrating fiscal, operational, and performances
- Integrating fiscal and operational data to evaluate system performance, identify risks, assess tradeoffs, and inform executive and Board decision-making.
- Financial forecasting, scenario analysis, and long-term planning to support sustainability and proactive risk mitigation.
- Applying data-driven improvement methods to adapt, adopt, or abandon practices based on evidence, impact, and alignment with district priorities.
- Leading across multiple functions and teams, including fiscal services and transportation operations, while maintaining clear accountability and organizational alignment.
- Coaching, mentoring, and developing leaders, building both leadership and technical capacity across teams.
- Organizational design, including succession planning, cross-training, and developing systems that reduce reliance on individuals and increase resilience.
- Communicating complex fiscal and operational information clearly and effectively to executive leadership, the Board, staff, and stakeholders.
- Collaborative leadership, including effective partnership with Administrative Services, labor partners, school sites, and community stakeholders.

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- Strengthening connectedness between central services and school sites through responsive support and clear communication.

**PHYSICAL REQUIREMENTS:**

**Physical abilities** include the usual and customary methods of performing the job's functions and require the following physical demands: occasional lifting, carrying, pushing and/or pulling; some climbing and balancing, some stooping, kneeling, crouching; reaching, handling, touching and/or feeling; manual dexterity to operate a telephone and enter data into a computer.

**Significant physical abilities** include ability to sit at a desk, conference table, or in meetings of various configurations for extended periods of time; see and read, with or without visual aids, laws and codes, rules, policies and other printed matter, computer screens and printouts; hear and understand speech at normal room levels and hear and understand speech on the telephone; speak in audible tones so that others may understand clearly in normal conversations.

**WORK ENVIRONMENT:**

The work environment characteristics described 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 noise level in the work environment is usually moderate.
- Employees in this position will be required to work indoors in a standard office environment and come into direct contact with district staff and the public