

**SAN DIEGO UNIFIED SCHOOL DISTRICT**

**POSITION DESCRIPTION**

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<b>TITLE:</b>	Manager, Financial Planning	<b>REPORTS TO:</b>	Director, Financial Planning
<b>DEPARTMENT:</b>	Financial Planning	<b>CLASSIFICATION:</b>	Classified Management
<b>FLSA:</b>	Exempt	<b>SALARY:</b>	Grade 026
<b>ISSUED:</b>	April 28, 2009		

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**BASIC FUNCTION:**

Manage the development, preparation, and distribution of all tentative and final budget allocations in support of the school site and program operations; manage the monitoring of categorical funding and school site and program expenditures for conformation with budget, State accounting requirements, granting agency expenditure guidelines, and State/Federal regulations; conduct, analyze, and report findings and recommendation of major budget studies, and control activities associated with income generation programs.

**REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)**

***E* = Essential Functions**

Manage the development, preparation, and distribution of all tentative and final budget allocations in support of the school site and program operations; manage the monitoring of categorical funding and school site and program expenditures for conformations with budget, State accounting requirements, granting agency expenditure guidelines, and State/Federal regulations. ***E***

Prepare monthly financial forecasts and accurate, current estimates. ***E***

Institute and manage formalized revenue and expenditure exchange processes. ***E***

Develop and implement models for strategic planning. ***E***

Conduct, analyze, and report findings and recommendation of major budget studies, and control activities associated with income generation programs, and administer position control for assigned areas. ***E***

Establish effective and ongoing communication with district administrators, representatives of County, State and Federal agencies and others to obtain budget and funding information related to a variety of District-related programs and services. ***E***

Analyze highly complex problems with budgets and take immediate appropriate action to remedy problems, and supervise the development and dissemination of information to district personnel, including budget reports, income and expenditure projections, complex financial information for various funds, forecasts, future revenues and expenses; and prepare and maintain a variety of financial and statistical data. ***E***

Provide training, direction, technical, and analytical support to professional staff, district committees, principals, division and department heads. *E*

Implement district policies and procedures affecting assigned areas of responsibility as appropriate and analyze State and Federal legislation to determine the effect on district programs, and apply and explain the provisions of the State's budget, Education Code, and other laws, rules and regulations related to budget issues. *E*

Conduct and facilitate meetings, resolve problems, provide direction for district personnel, and serve on district-wide committees, task forces, and panels. *E*

Supervise, train and direct assigned staff members and participate in the interview, selection and training process for new employees. *E*

Perform related duties as assigned.

**EDUCATION AND EXPERIENCE:**

A combination of training, experience, and/or education equivalent to a bachelor's degree with a major in finance, accounting, business administration, or related field and four years of supervisory experience in budget, cost control, performance measurement, or detail cost accounting/analysis. A master's degree is preferred.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

- District, state and federal methodologies, procedures, and applicable laws, codes, and regulations related to district budget control.
- Principles and techniques of budget preparation and control and strategic financial planning.
- Oral and written communication skills.
- Principles and practices of administration, supervision and training.
- Applicable laws, codes, regulations, policies and procedures.
- Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**

- Provide leadership and direction in assigned functions.
- Plan, organize and administer a district budget program in compliance with rules and regulations.
- Develop a five-year financial plan and provide financial forecasting.
- Determine the nature and scope of systems analyses or audits.
- Maintain current knowledge of applicable provisions of federal, state and district laws, rules and regulations.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Analyze situations accurately and adopt an effective course of action.
- Prepare comprehensive narrative and statistical reports.
- Direct the maintenance of a variety of reports and files related to assigned activities.
- Train and evaluate the performance of assigned staff.
- Interpret, apply and explain rules, regulations, policies and procedures.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Indoor, office setting.

**PHYSICAL ABILITIES:**

Hearing and speaking to exchange information; seeing to perform assigned duties; sitting or standing for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Job Code 1653

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