

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Director, Financial Planning, Monitoring and Accountability	REPORTS TO:	Executive Director, Financial Planning and Development
DEPARTMENT:	Financial Planning and Development	CLASSIFICATION:	Classified Management
FLSA:	Exempt	SALARY GRADE:	034
ISSUED:	April 29, 2014		

BASIC FUNCTION:

Plan, organize, control and direct the implementation of federal, state, and district requirements related to planning, monitoring and accountability; plan, organize, and exercise control over expenditures for conformance to budget, accounting standards, and funding guidelines; administer the budget process; administer district appropriations and expenditures; direct the maintenance of the district's budget, supply accounts, and projections; act as the district's California Department of Education (CDE) Accountability Coordinator and Title I Coordinator; supervise and evaluate the performance of assigned staff.

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**

Plan, organize, control and direct district functions to provide guidance and assistance to schools and departments implementing programs and activities funded through State and Federal Programs; support School Site Councils (SSCs) and the District Advisory Council for Compensatory Education (DAC) to effectively carry out their assigned responsibilities; oversee the Single Plan for Student Achievement (SPSA), Title I School-wide Programs (SWP), and accreditation self-studies (WASC); coordinate the California Department of Education (CDE) Federal Program Monitoring (FPM) on-site and online reviews, site reviews, and related activities. ***E***

Design, oversee, and facilitate development of a variety of student achievement data reporting tools and displays, and assist central office and school site staff to use data to inform practice.

Oversee the application of theories and principles of scientific research methodology in the development of study designs for district programs and initiatives; the selection of appropriate quantitative and qualitative evaluation methodology; and appropriate standards-based, criterion-referenced, and norm-referenced assessments; and the development of questionnaires, observation instruments, and other data gathering instruments as needed. ***E***

Plan, organize, and exercise control over expenditures for conformance to budget, accounting standards, and funding guidelines. ***E***

Administer the budget process; administer district appropriations and expenditures; direct the maintenance of the district's budget, accounts, and projections. ***E***

Oversee the analysis and resolution of highly complex problems with budgets 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. ***E***

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

Provide technical expertise, information and assistance to the Executive Director, Financial Planning and Development regarding assigned functions; assist in the formulation and development of policies, procedures and programs; advise the Executive Director, Financial Planning and Development of unusual trends or problems and recommend appropriate corrective actions. *E*

Plan, organize and implement long and short-term programs and activities to improve assigned programs and services. *E*

Represent the Financial Services Division and provide financial information in collective bargaining. *E*

Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities and personnel. *E*

Communicate with other administrators, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange information; develop policies and procedures to encourage effective and efficient management controls. *E*

Select, train, and evaluate performance of assigned personnel. *E*

Perform related duties as assigned. *E*

EDUCATION AND EXPERIENCE:

A combination of education, training, or experience equivalent to a bachelor's degree from a college or university in educational planning and accountability, finance, or other related field and seven years of progressively responsible experience in educational accountability, program monitoring and/or evaluation, finance or a related profession. A master's degree is desirable.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

KNOWLEDGE OF:

- Financial techniques required to direct activities of a large-scale operation.
- Applicable laws, codes, regulations, policies and procedures.
- Policies related to standards, assessment, accountability, planning, promotion/retention, curriculum and instruction, data access and confidentiality, and related areas.
- Data analysis processes in relation to instructional planning.
- Principles and practices of administration, supervision, and training.
- Principles and techniques of budget preparation and control.
- Oral and written communication skills.

ABILITY TO:

- Provide leadership and direction in assigned functions.
- Maintain current knowledge of applicable provisions of federal, state and district laws, rules and regulations, and procedures.
- 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.
- Plan, prioritize, and manage programs, projects, and budgets to meet timelines and utilize resources effectively.
- Interpret, apply, and explain rules, regulations, policies, and procedures.
- Supervise and evaluate the performance of assigned staff.

WORKING CONDITIONS:

ENVIRONMENT:

Indoor, office setting.

PHYSICAL ABILITIES:

Dexterity of hands and fingers to operate a computer keyboard; sitting or standing for extended periods of time; hearing and speaking to exchange information and make presentations; seeing to read and write reports; lifting light objects.

Job Code 1259

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