

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Chief Financial Officer	REPORTS TO:	Superintendent of Public Education
DEPARTMENT:	Finance	CLASSIFICATION:	Classified Management
FLSA:	Exempt	SALARY GRADE:	054
REVISED:	April 29, 2014		

BASIC FUNCTION:

Plan, organize, control, and direct the District's Financial Operations Division; develop information and recommend policies and procedures for immediate and long-range financial management and planning; direct the development and implementation of the District's annual budget; serve as a member of the Superintendent's Cabinet.

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 the District's Financial Operations Division with administrative responsibility for financial functions of the District and its associated organization, San Diego Unified School District Public School Corporation. ***E***

Develop information and recommend policies and procedures for immediate and long-range financial management and planning; direct the development and implementation of the District's annual budget. ***E***

Serve as a member of the Superintendent's Cabinet. ***E***

Direct, coordinate and supervise the operations of Financial Planning and Development; Budget Development; Financial Planning, Monitoring and Accountability; Office of the Controller; and Payroll/Benefits. ***E***

Develop and prepare the annual preliminary budget for the Finance Division; analyze and review budgetary and financial data; control and authorize expenditures in accordance with established limitations. ***E***

Provide direction and coordination of the financial planning and budgeting process of division/departments and school site governance teams as necessary for conformance to District financial policies and procedures. ***E***

Develop and direct programs of budget analysis and expenditure reporting as required for internal management of District and by grantors of special categorical funding. ***E***

Review with authority for disapproval, all expenditures and manpower requisitions for compliance with District's budget and state and federal rules and regulations. ***E***

Direct preparation of legislative materials relating to school finance; direct the analysis of legislation pertaining to school finance and recommend District position. ***E***

Develop and maintain the District's financial planning and budgeting manual pertaining to the District's financial policies and detailed procedures necessary for implementation and adherence to these policies. ***E***

Establish and maintain liaison with various government groups including the County Auditor and Controller, County Treasurer, County Office of Education, and state departments of education and finance. ***E***

Respond to requests from auditors' representatives, grantor organizations, and governmental organizations, including official financial reports and claims; represent the District during audits by public auditors. *E*

Direct the activities as may be acquired to obtain all financial resources that are available or that may become available to District, including the investment of District funds not deposited with County Treasurer. *E*

Maintain contact with the banking industry and direct the investment of District funds which are not deposited with the County Treasurer. *E*

Oversee the preparation of the District's consolidated application and reporting; provide overall direction to major grant proposals especially for the aspect of financial controls and reporting. *E*

Establish and maintain financial liaison with citizens groups such as Citizens Advisory Committees, Taxpayers Association, Chamber of Commerce, other interested public groups, bond rating organizations and others as directed. *E*

Supervise and evaluate the performance of assigned staff; provide for continuing departmental staff training programs in finance analyses and related functions; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. *E*

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

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

Operate a computer and assigned software programs; operate other office equipment as assigned. *E*

Direct division efforts in technology modernization for financial operations. *E*

Perform other duties as assigned

EDUCATION AND EXPERIENCE:

A combination of training, experience and/or education equivalent to a bachelor's degree in business administration, accounting, public administration or a related field and eight years of progressively responsible fiscal and business management experience.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

KNOWLEDGE OF:

- Organizational development principles and practices.
- Planning, organization and direction of procedural guidelines and the District's Finance Division
- Financial techniques required to direct activities of a large-scale operation.
- Principals and techniques of budget preparation and control.
- 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:

Direct, coordinate and supervise the operations of the accounting, budgeting, and payroll/benefits functions of a large public agency.

Review existing and pending legislation related to procedural guidelines and the District finance programs and recommend origination, modification, or support of legislative measures.

Maintain current knowledge of applicable provisions of applicable federal, State and District laws, rules and regulations.

Communicate effectively both orally and in writing.

Interpret, apply and explain rules, regulations, policies and procedures.

Establish and maintain cooperative and effective working relationships with others.

Operate a computer and assigned office equipment.

Analyze situations accurately and adopt an effective course of action.

Meet schedules and time lines.

Work independently with little direction.

Plan and organize work.

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 1232

PH