

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

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| TITLE: | Executive Director, Financial Planning and Development | REPORTS TO: | Chief Financial Officer |
| DEPARTMENT: | Financial Planning and Development | CLASSIFICATION: | Classified Management |
| FLSA: | Exempt | SALARY GRADE: | 042 |
| ISSUED: | April 29, 2014 | | |

BASIC FUNCTION:

Plan, organize, control, and direct the functions of the Financial Planning and Development Department, including Budget Development and Financial Planning, Monitoring and Accountability; serve as the District's representative for Federal and State programs and compliance; supervise and evaluate the performance of assigned staff.

REPRESENTATIVE DUTIES:

Serve as the District's representative for Federal and State programs and compliance and with any related outside agencies.

Plan, organize, control, and direct the district-wide system of accountability, budget and financial administration. *E*

Formulate, develop and implement policies and procedures for immediate and long-range budget management and planning for the District. *E*

Direct and support the financial performance of district-wide programs and initiatives. *E*

Direct annual budget formulation and planning; assist in preparation of the annual budget and other statutory County, State, and Federal reporting. *E*

Direct the review, analysis, and reporting of departmental/office budgets and expenditures and variances; control approved financial plans and budgets; arrange reprogramming of funds in accordance with approved guidelines and policy. *E*

Direct the preparation of annual Federal and State program compliance and reporting, such as Title I Ranking and Funding Report, for board approval and distribution to centrally funded school programs; coordinate presentations to district advisory groups, district leadership, and the Board of Education. *E*

Direct the development and submission of the district's annual Consolidated Application for Federal and State categorical program funds. *E*

Consult and develop and maintain communication with district advisory groups. *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 Chief Financial Officer regarding assigned functions; assist in the formulation and development of policies, procedures, programs and special projects; advise the Chief Financial Officer of unusual trends or problems and recommend appropriate corrective action. *E*

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

Represent the Finance Division 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.

EDUCATION AND EXPERIENCE:

A combination of training, experience and/or education equivalent to a Master's degree with a major in business administration, finance, accounting, public administration or a related field and seven years of financial administration experience in a large public or private organization. Substantial management experience directing budgeting efforts and planning is required.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

KNOWLEDGE OF:

Financial techniques required to direct activities of a large-scale operation.
Principals and techniques of budget preparation and control.
Principles and practices of administration, supervision and training.
Applicable laws, codes, regulations, policies and procedures.
Oral and written communication skills.

ABILITY TO:

Provide leadership and direction in assigned functions.
Plan, organize, control, and direct a system of budget and financial administration.
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.
Demonstrate interpersonal skills using tact, patience, and courtesy.

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 1247

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