

Sweetwater Union High School District

CHIEF FINANCIAL OFFICER

Purpose Statement

The job of Chief Financial Officer is done for the purpose/s of implementing, directing and maintaining the district's fiscal programs and services; serving as a resource to school personnel, other departments, and the Board; and maintaining staffing to ensure program objectives and services are achieved within budget.

Essential Functions

- Develops budgets and financial forecasts for the purpose of providing financial guidance and recommendations to administrative personnel, Superintendent and/or Board.
- Manages assigned program and/or departmental responsibilities for the purpose of achieving outcomes in relation to organizational objectives, and ensuring conformance with legal, financial and District requirements.
- Conducts internal audits (e.g. general and special funds) for the purpose of ensuring program operations are within budget and in accordance with fiscal practices.
- Supervises the collection of developer fees and Mello Roos taxes for the purpose of ensuring accurate and timely receipt and recording of funds.
- Assists external agency personnel (e.g. external auditors, grant representatives, regulatory agency personnel, etc.) for the purpose of serving as liaison for the District in providing requested information and general support to the performance of their duties.
- Maintains a variety of fiscal information, files and records (e.g. accounts payable, accounts receivable, student activities, contracts, etc.) for the purpose of providing an up-to-date reference and audit trail for compliance.
- Compiles data from a wide variety of sources (e.g. staff, public agencies, legal regulations, other school districts, etc.) for the purpose of analyzing issues, ensuring compliance with various policies and procedures, and/or monitoring program components.
- Participates in meetings, workshops and seminars for the purpose of conveying and/or gathering information required to perform functions.
- Performs personnel functions (e.g. interviewing, evaluating, supervising, etc.) for the purpose of maintaining adequate staffing, enhancing productivity of personnel and achieving objectives within budget.
- Develops strategic (long and short range) plan in relation (e.g. enrollment projections, bond/levy, policies, procedures, staffing, forms/materials, equipment, etc.) for the purpose of ensuring organizational objectives are achieved in the most efficient and timely manner.
- Advises Superintendent on issues and/or problems for the purpose of providing information (pros and cons) for making knowledgeable decisions that are legally compliant.
- Monitors fund balances of assigned programs and related financial activity for the purpose of ensuring that allocations are accurate, related revenues are generated, expenses are within budget limits and/or fiscal practices are followed.
- Analyzes a variety of financial information (e.g. budget formulas, legal guidelines, budget variances, cost projections, etc.) for the purpose of providing required fiscal direction and support, making recommendations, maximizing use of funds, and/or ensuring overall operations are legally compliant and within budget parameters.
- Facilitates meetings that may frequently involve a wide range of issues (e.g. financial procedures, regulatory requirements, community involvement, actions involving outside agencies, interdepartmental

needs, etc.) for the purpose of identifying appropriate actions, developing recommendations, supporting other staff, and serving as the district representative.

- Analyzes short and long term department and district wide operating plans for the purpose of providing required fiscal guidance and support.
- Prepares a wide variety of materials in written and electronic formats (e.g. annual budgets, financial statements, reports for the Board, Superintendent, department administrators, etc.) for the purpose of documenting activities and issues, meeting compliance requirements, and/or providing supporting materials for requested actions.
- Presents information (e.g. budget overviews, accounting processes, distribution formulas, etc.) for the purpose of communicating information, gaining feedback and ensuring adherence to established internal controls.
- Collaborates with others (e.g. district personnel, administration and board members, other district personnel, community organization representatives, etc.) for the purpose of implementing and maintaining services and/or programs.
- Researches financial information and related legal issues (e.g. discrepancies, current legislative trends, etc.) for the purpose of evaluating compliance requirements and potential implications on district operations.
- Responds to a wide variety of inquiries of staff, district personnel, other professional organizations, etc. (e.g. accounting guidelines, expenditure status, grant guidelines, etc.) for the purpose of resolving problems, providing information and/or referring to appropriate personnel.

Other Functions

- Performs other related duties, as assigned, for the purpose of ensuring an efficient and effective work environment.

Job Requirements: Minimum Qualifications

Skills, Knowledge and Abilities

SKILLS are required to perform multiple, highly complex, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: applying assessment instruments; operating standard office equipment; performing accounting procedures; planning and managing projects; preparing and maintaining accurate records; and using pertinent software applications.

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: advanced financial concepts, techniques and regulations; accounting/bookkeeping principles; and pertinent federal, state and local laws, codes and regulations.

ABILITY is required to organize a number of activities, meetings, and/or events; routinely gather, collate, and/or classify data; and consider a number of factors when using equipment. Flexibility is required to work with others in a variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using a variety of standardized methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of widely varied types and/or purposes; and utilize a variety of job-related equipment. In working with others, problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups; maintaining confidentiality; meeting deadlines and schedules; setting priorities; and working as part of a team.

Responsibility

Responsibilities include: working independently under broad organizational policies to achieve organizational objectives; managing major organizational components; and determining the use of funds. Utilization of significant resources from other work units is sometimes required to perform the job's functions. There is continual opportunity to significantly impact the Organization's services.

Working Environment

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling; some stooping, kneeling, crouching, and/or crawling; and significant fine finger dexterity. Generally the job requires 65% sitting, 15% walking, and 20% standing. The job is performed under a generally hazard free environment.

Education/Experience

Master's degree from an accredited college or university with major course work in business or public administration or related field. Six years of progressively responsible senior management fiscal experience, preferably in a comparable size municipal or education institution.

Required Testing

None Specified

Continuing Educ./Training

None Specified

Certificates

None Specified

Clearances

Pre-placement Physical Exam; TB Clearance; and Criminal Justice Fingerprint/Background Clearance

"Sweetwater Union High School District programs and activities shall be free from discrimination based on age, gender, gender identity or expression, or genetic information, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics." SUHSD Board Policy 0410