

DIRECTOR OF BUDGET SERVICES AND FINANCIAL PLANNING

DEFINITION

Directs the administration of the Budget Services and Financial Planning Division by planning, organizing, directing, and reviewing the District functions of budget planning and administration and financial services for schools.

TYPICAL DUTIES

Directs and administers the activities of the Budget Services and Financial Planning Division, including:

- Preparation, administration, and control of the annual General Fund budget and all special fund budgets and preparation of all student enrollment and attendance reports required by the State.
- Assistance to school and cluster staffs in budget development and administration, including maintenance of financial and position records and controls, and functional supervision over financial management of student body activities in all schools.
- Assistance to the schools in the management of student-body accounts, cash collections, imprest funds, enrollment and attendance records, payroll time records, and other records.
- Interprets the District budget and financial support to individuals, government and business organizations, professional groups, and the general public, and coordinates with the Office of Communications in providing fiscal information to the news media.
- Designs, conducts, and reviews extensive research studies in the fields of school finance, school district budgeting, and other forms of financial research, and prepares or reviews financial forecasts.
- Makes or participates in presentations to the Board, legislators, legislative bodies, State and federal officials, civic organizations, and others relative to District financial status, projections, legislation and related matters.
- Directs, reviews, and participates in the analysis of current and prospective problems in budget administration.
- Participates at the executive level in the development and implementation of internal Division policies, procedures and planning.
- Directs and participates in financial and procedural analysis of legislative and collective-bargaining proposals and provides data for District representatives.
- Represents the Chief Financial Officer as assigned.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

The Director of Budget Services and Financial Planning directs and coordinates the administration of the Budget Services, Financial Planning and Research, and School Fiscal Services Branches of the Budget Services and Financial Planning Division.

The Chief Financial Officer is the executive responsible for the direction of the financial activities of the District. The Deputy Chief Financial Officer assists in managing the financial services of the District: participates in the planning and implementation of policies and programs: and acts as Chief as required.

The Controller directs and coordinates the administration of the Business Accounting, General Accounting, and Payroll Services Branches of the Accounting and Disbursement Division.

SUPERVISION

Administrative and technical direction is received from the Chief Financial Officer. Administrative direction is exercised over subordinate branch directors.

CLASS QUALIFICATIONS

Knowledge of:

Theory, principles, and practice of modern school district financial management, including accounting, auditing, and budgetary procedures, and fiscal controls
California School Accounting Manual and Education Code
Board of Education rules and regulations and Personnel Commission rules
Computer Information systems capabilities and methods used in budget development and administration
California attendance and enrollment accounting and reporting
Research and analysis techniques
Principles of program budgeting
Principles of public administration and personnel management
District collective bargaining agreements

Ability to:

Analyze data and apply pertinent laws, regulations, and principles in reaching sound conclusions
Plan, coordinate, and direct a variety of complex operations
Interpret rules, regulations, and policies and explain them orally and in writing
Make clear and effective oral presentations

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university with a bachelor's degree including or supplemented by courses in finance, accounting, auditing, school business administration, public administration, school finance, governmental accounting or economics.

Experience:

Three years of experience in executive or management positions with financial management responsibilities for a school district with multiple business functions or an organization or firm with at least 1,000 employees.

Special:

A valid driver's license to legally operate a motor vehicle in the State of California and the use of a motor vehicle, or the ability to utilize an alternative method of transportation.

SPECIAL NOTES

1. Management class, exempt from bargaining units.
2. An employee in this class may be subject to the reporting requirements of the District's Conflict of Interest Code.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.

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08-31-2015
SD

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11-26-25
Transportation
Language Only