

Class Codes

SENIOR EXECUTIVE DIRECTOR OF FINANCE POLICY	1157
DIRECTOR OF FINANCE POLICY	1012

DEFINITION

The Senior Executive Director of Finance Policy works directly with the Deputy Superintendent, Business Services and Operations and the Office of the Chief Business Officer (CBO) in the creation, communication, and execution of strategic initiatives and policies and advises on related financial matters at the executive level. The Director of Finance Policy works directly with the Chief Business Officer and directs and reviews projects and committee work for the administration of various financial activities related to the General Fund budget, special fund budgets, and redevelopment matters.

TYPICAL DUTIES

- Directs and reviews projects and assists with the coordination of an administrative work committee for various financial activities, including redevelopment matters.
- Manages projects and coordinates external efforts related to finance, including interfacing with executive staff and external partners.
- Participates with other administrators in the formulation of District policies and plans, particularly as they relate to financial and operational matters.
- Participates in collective bargaining negotiations and advises Board Members and administrative staff regarding financially related issues.
- Confers with representatives of private firms, other governmental agencies, legal authorities, and the public in regard to matters affecting financial services.
- Attends professional, governmental, and community committees, task forces, commissions, and in problem solving conferences with parents, community and governmental representatives, and District and Board staff.
- Collaborates in the preparation and completion of reports and interpretation of data for administrators, staff, and the public for the purpose of effective decision making for the Superintendent.
- May assist in the coordination of District debt issuance transactions and represents the Office of the CBO for ongoing oversight and compliance of a \$20 Billion bond and debt program.
- May assist with compliance issues related to use of categorical funds and bond proceeds issued by the District.
- May direct, review, and participate in the analysis of laws, rules, regulations, options, and decisions, that affect the financial activities of the District and advises District administrators and others of the implications.
- The Senior Executive Director of Finance Policy assists the Deputy Superintendent, Business Services and Operations, and Chief Business Officer with the development of strategies related to reporting structures, accountabilities, and resource and performance management.
- The Director of Finance Policy may represent the Chief Business Officer (CBO) and/or the Deputy Chief Business Officer, Finance on parcel tax and redevelopment matters; 403(b) and 457 committees; and assists with the budget process, communications, and legislative agenda.
- May oversee the District's Local Control and Accountability Plan (LCAP) and the Local Control Funding Formula (LCFF) work.
- Performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

The Senior Executive Director of Finance Policy advises and serves as a District liaison for strategies, policy and financial matters.

The Director of Finance Policy reports to the Chief Business Officer and directs and reviews projects and committee work for the administration of various financial activities related to the General Fund budget, special fund budgets, and redevelopment matters.

The Chief Business Officer is the executive responsible for the direction of the financial services, functions and activities of several major business divisions of the District.

The Deputy Chief Business Officer, Finance 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.

## SUPERVISION

The Senior Executive Director receives administrative direction from the Deputy Superintendent, Business Services and Operations, and Chief Business Officer. Supervision may be exercised over management, administrative, and professional employees. The Director of Finance Policy receives administrative direction from the Chief Business Officer or designee and provides general direction to lower-level administrators and managers.

## CLASS QUALIFICATIONS

### Knowledge of:

- Education code, laws and regulations concerning public education financing
- Legal bases and sources of finances of California public education
- Theory and understanding of accounting, budgeting, auditing, and fiscal management, with emphasis on governmental operations
- State laws, the California School Accounting Manual, and Government Accounting Standards Board and other regulations affecting school district financial affairs
- Principles of organization, management, systems analysis, budgeting, staff development, communications, and personnel administration
- Legislative analysis and inter-governmental relations
- Arbitrations, mediation, and dispute resolution, and collective bargaining
- Benefits and benefits administration, including deferred compensation and health benefits
- Funding flows to be preserved under the redevelopment laws
- Concepts and applications of electronic data processing
- Principles of training, employee evaluation, employee relations, progressive discipline, and merit system employment
- Principles of public relations

### Ability to:

- Plan and administer complex technical operations involving coordination of efforts of multiple specialized units
- Analyze present problems, identify potential problems, and develop and evaluate possible solutions
- Communicate effectively in writing and orally
- Analyze financial and statistical data and make or recommend decisions as indicated
- Coordinate personnel management activities and resolve immediate and long-range problems
- Maintain, through subordinates, the accuracy and currency of records and reports, while meeting regular and special demands for data

Make effective public presentations of complex data and plans

## ENTRANCE QUALIFICATIONS

### Education:

Graduation from a recognized college with a bachelor's degree in business or public administration, finance, or a related field is required. A graduate degree in business or public administration, finance, law, or a related field is highly preferable.

### Experience:

Five years of business, legal, policy, or operations experience at the executive or project manager level pertaining to school finances or legislation.

### 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. Senior Management classes, 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.
3. Travel to locations throughout the District may be required.

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.

Revised  
3-14-24  
SD