

## **ASSISTANT SUPERINTENDENT, BUSINESS & FISCAL SERVICES**

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### **SUMMARY OF DUTIES**

Under the direction of the Superintendent, coordinates and supervises the activities of the units responsible for the business and financial affairs of the District including Budget & Finance, Child Nutrition, Facilities, Purchasing/Warehouse/Reprographics, and Transportation; serves as technical expert and adviser to the Superintendent on the District's needs, difficulties, and opportunities related to business, finance, property, and material; directs and coordinates the preparation of the District's annual budget for approval and adoption by the Board of Trustees; oversees short- and long-term planning and evaluation of the business and financial affairs of the District; and performs a variety of other duties relative to assigned area of responsibility.

### **DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES**

*The descriptions below are provided to demonstrate how this classification fits within the organization and to assist in quickly identifying key differences between classifications which may appear otherwise similar. All classifications are listed in order from highest to lowest.*

The Assistant Superintendent, Business & Fiscal Services is a single position executive-level management classification which provides overall leadership and assumes responsibility for all units under the oversight of the Business & Fiscal Services division including Budget & Finance, Child Nutrition, Facilities, Purchasing/Warehouse/Reprographics, and Transportation.

The Director of Finance is a single position management-level classification responsible for the direct oversight of the Budget & Finance department including accounts payable, accounts receivable, budget control, and payroll functions of the District.

### **SUPERVISION RECEIVED AND EXERCISED**

- Receives supervision from the District Superintendent;
- Provides supervision and work direction to all administrators under the oversight of Business & Fiscal Services and all employees assigned directly to the Business & Fiscal Services office.

### **ESSENTIAL DUTIES**

- Directs, coordinates, supervises, and ensures the efficiency and effectiveness of the operations of all units under the oversight of the Business & Fiscal Services division, inclusive of Budget & Finance, Child Nutrition, Facilities, Purchasing/Warehouse/Reprographics, and Transportation; ensures compliance with local, state, and federal laws relating to school business operations;
- Directs and coordinates the preparation of the District's annual budget for approval and adoption by the Board of Trustees; compiles, analyzes, and consolidates budget information to ensure appropriate budgetary allocations to accomplish District objectives; ensures appropriate budgetary controls;
- Provides leadership and support to units under the oversight of the Business & Fiscal Services division in order to create a high performance environment that supports the District's goals and objectives; works to resolve issues and conflicts within subordinate departments; develops policies and procedures to encourage effective and efficient management;
- Provides assistance and direction to department and school administrators as needed in the preparation, control, and reporting of department and site budgets;
- Provides technical expertise, information, and assistance to the Superintendent and Board of Trustees regarding assigned functions; assists in the formulation and development of District policies, procedures, and programs; advises the Superintendent in the development of comprehensive short- and long-term planning and evaluation of the business and financial affairs of the District;
- Directs activities as may be required to obtain all financial resources available to the District, including investment of District funds not deposited with County Treasurer;
- Recommends necessary changes in the organization of business and financial operating units and in the policies and procedures affecting them;

- Attends meetings of the Board of Trustees; prepares and presents reports regarding the financial and business administration of the District to the Board of Trustees and at other public forums;
- Provides support to District departments as well as internal and external stakeholders in assessing the financial impact of legislation, ballot measures, negotiations, and related matters; conducts analyses of impending legislation with regard to potential financial, procedural, and related implications on the District's programs and operational needs;
- Anticipates, evaluates, and interprets significant national, state, and local trends and developments regarding business and financial matters and makes appropriate recommendations to the Superintendent and Board of Trustees;
- Represents the District at local, state, and national meetings of organizations concerned with business and financial management; serves on District committees as a resource person regarding business and financial matters;
- Establishes relationships and works cooperatively with various community and government groups, including the County Auditor and Controller, County Treasurer, County Office of Education, state departments of education and finance, taxpayers' associations, the Chamber of Commerce, citizen's advisory committees, bond rating organizations, and other interested public groups in order to improve the business and financial operations of the District;
- Responsible for enrollment projections for staffing purposes, budgeting and long-range planning.
- Serves as a member of the District's negotiating team and negotiates with employee groups in regards to wages, working conditions, and other matters of employment;
- Works with District personnel to project student enrollment, building and facilities, energy, and capital equipment needs, and other cost items for district and individual school improvement;
- Responds to requests from auditors, grantor organizations, and governmental organizations; represent the District during audits by public auditors;
- Leads efforts to find and acquire land for new school sites as directed by the Board of Trustees; ensures compliance with the California Environmental Quality Act and other applicable laws and regulations;
- Attends and leads management meetings in order to contribute to the development of teamwork and improved service for all students.

#### **Other Related Duties**

- May serve as acting Superintendent when so designated in the absence of the Superintendent;
- Performs related duties and responsibilities as required.

#### **KNOWLEDGE, ABILITIES, AND TRAITS**

##### **Knowledge of:**

- Current theory, principles, and practice of modern school district business and financial management;
- Principles of program budgeting;
- Principles of personnel administration;
- Attendance accounting laws, rules, and regulations;
- Auditing of K-12 public schools, California School Accounting Manual, and Governmental Accounting Standards (GASB) requirements;
- Budget planning, development, control, and reporting requirements in a public school environment;
- Business administration and collective bargaining laws, rules, and regulations in California;
- Methods, procedures, and planning involved in school district facilities planning and construction projects;
- Food services, maintenance and operations, pupil transportation, and purchasing and warehousing operations;
- Provisions of federal, State and local laws, codes, and regulations including laws and regulations applying to school district financial and business operations;
- Site acquisition and compliance with California Environmental Qualities Act (CEQA) laws and regulations;
- California Standardized Accounting Code System (SACS);
- California Public School Construction Rules and Regulations and Accounting;
- Implementation of developer fees and assessment;
- Negotiation of mitigation agreements with developers.

**Ability to:**

- Select, supervise, train, direct, motivate, and evaluate staff;
- Plan, direct, make decisions, establish priorities and coordinate a variety of complex technical operations involving efforts of multiple specialized units;
- Analyze situations accurately and adopt an effective course of actions;
- Exercise good and sound judgment;
- Plan and organize work to meet schedules and timelines in an environment with constantly changing priorities;
- Prepare clear and comprehensive reports;
- Establish and maintain effective working relationships;
- Explain complex technical information clearly and concisely;
- Work effectively with officials and employees of the District, other public agencies, and the public;
- Interpret laws, rules, regulations and policies related to business and financial matters;
- Analyze financial statements and fiscal reports and prepare a complex budget;
- Chair committees and bring consensus on complicated issues;
- Speak effectively before City Council, Board of Supervisors and other public agencies;
- Implement successful conflict resolution with parents, community, and staff;
- Communicate effectively, both orally and in writing;
- Operate a variety of office machines and equipment such as a personal computer and all applicable hardware and software, copiers, scanners, typewriters, calculators, and fax machines;
- Maintain confidentiality of privileged information obtained in the course of work.

**Traits:**

- Appreciates the differences among people;
- Diligently attends to details and quality;
- Easily adapts to situations and changes;
- Effectively manages one's own time, priorities, and resources;
- Is trustworthy and responsible for his/her actions;
- Logically grasps and thinks through issues and problems;
- Promotes goals and leads by example;
- Remains steady under pressure;
- Stays focused and has good work ethic;
- Strives to meet customers' needs;
- Works around obstacles and is self-starting.

**EMPLOYMENT STANDARDS****NON-CREDENTIALLED APPLICANTS – MINIMUM REQUIREMENTS:**

**Education:** A Bachelor's degree required in business administration, finance or related field. Master's Degree (preferred). A Chief Business Official (CBO) certification from the California Association of School Business Officials (CASBO) is highly desirable.

**Experience:** Five years of school business administration experience, comparable government or private sector experience, and/or administrative experience in a supervisory role in business and/or financial management.

**CREDENTIALLED APPLICANTS – MINIMUM REQUIREMENTS:**

**Education:** A Master's degree required; Current valid Administrative Credential required. A Chief Business Official (CBO) certification from the California Association of School Business Officials (CASBO) is highly desirable.

**Experience:** A minimum of five years experience as a school site administrator, District Office, County Office of Education, or State Department of Education administrator required. Experience working in business and/or financial management preferred.

*\*Alternate variations of equal education/experience may be considered by Personnel Commission staff as acceptable to qualify for participation in the examination process.*

**Special:** Possession of a valid California Driver's License.

Ability to be insured, and continue to be insurable, by the District's liability insurance carrier.

All licenses, certificates, and other requirements listed above are required at the time of employment and must be maintained during the course of employment unless otherwise noted.

**Physical Requirements:** Employees in this classification stand, walk, sit, stoop, bend, reach overhead, lift and carry up to 20 pounds without assistance, push, pull, use fingers, wrists, and hands repetitively, use both hands simultaneously, speak clearly, hear normal voice conversation, and see small details.

**WORK ENVIRONMENT:** Employees in this classification work primarily inside an office environment, with frequent interruptions, with changing priorities and short deadlines, and may drive an automobile to conduct work. On occasion the incumbent may be required to visit construction sites and work in temperatures below 50 degrees and over 90 degrees, dry atmospheric conditions, poorly ventilated areas, wet or damp areas, on uneven or slippery surfaces, and in proximity to electrical hazards and machinery with moving parts, fumes, allergenic dust, chemicals, odors, toxic materials.

**APPOINTMENT:** In accordance with Education Code Section 45301, an employee appointed to this class must serve a probationary period of one (1) year during which time an employee must demonstrate an overall satisfactory performance in order to attain permanent status.

**NOTE:** If adopted as Senior Management, an incumbent does not attain permanent status.

**Salary Range:** Management Salary Schedule (if not indicated as Senior Management)  
Negotiable (if designated as Senior Management by the Board of Trustees)

**Approved:** 11/74

**Revised:** 9/03, 6/08, 6/17, 7/20

**Adopted as Classified Senior Management**