



BUDGET DIRECTOR (FINANCIAL SERVICES DIRECTOR)

BASIC FUNCTION

Under administrative direction, direct the staff and activities essential to the development, preparation, review, analysis, evaluation and administration of the District's budget; evaluate fiscal impact of budget submittals and related issues on departmental budgets and Districtwide budget; oversee staff in the tracking and monitoring of budget expenditures, ensuring that allocated funds have been spent appropriately; develop and implement budgetary control procedures; develop and review financial scenarios and models, advising senior leaders regarding financial impacts of existing and proposed budgets.

REPRESENTATIVE DUTIES

The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.

- Plan, direct, oversee and evaluate the work of professional, technical and support staff in preparing and maintaining the budget, creating a long-term forecast, and supporting the District with financial analyses on critical decisions.
- Lead and manage the annual budget development process; prepare and present recommendations regarding the annual and biennium operating budgets across several funds.
- Analyze, monitor and report on expenditures in relation to authorized budgets; confer with authorized budget-holders and provide analytical and technical support to all divisions of the District regarding issues that impact the District's budget.
- Direct and monitor staff in the examination of budget and allocation requests on the full scope budget issues for completeness, accuracy, and conformance with procedures, regulations, and policies; evaluate and approve recommendations regarding needs and priorities of assigned budgets to determine where funds may be reduced and where additional funds may need to be requested; examine alternatives available to continue funding programs.
- Facilitate the compilation of statistical, fiscal, and program information for the formulation and administration of budgets and budgetary allocations.
- Coach and support the budget team to identify opportunities to provide high-impact analysis and recommendations and that will help the District operate more efficiently and deliver on its established goals and objectives.
- Demonstrate a commitment to the Portland Public Schools strategic plan and equity initiatives by developing a thorough knowledge and application of them; participating in staff development, in-services and trainings related to diversity, equity and inclusion in the workplace and in K – 12 education; modeling

appropriate behaviors; developing, recommending and implementing improvements to business practices with awareness and understanding of their impact in a racially and culturally diverse community.

- Participate and represent the District and/or lead meetings, workshops, seminars and in-services related to public agency budgeting and government financial services.
- Build relationships with peers in neighboring districts and at the State Department of Education in order to understand trends, policy analyses and any related insights.
- May serve as a District representative in collective bargaining and negotiations.
- Perform related duties as assigned.

Note: At the end of some of the duty statements there is an italicized "E", which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.

EDUCATION AND EXPERIENCE

Education: A Bachelor's degree in Accounting, Business Administration, or related field

Experience:

- Five (5) years of experience developing, monitoring, analyzing and overseeing highly complex budgets in excess of \$50 million in a full-service public agency or in the private sector
- Two years of supervising professional staff

A Master's degree in one of the above-identified fields may substitute for two years of the required experience. Any other combination of education, training and experience which demonstrates the candidate is likely to possess the skill, knowledge, ability and trait characteristics essential for this classification may be considered.

PREFERRED QUALIFICATIONS

- Experience working in a unionized environment
- Supervisory experience managing a team of 10 or more staff
- A Master's degree in Accounting, Business Administration, or related field
- Experience with financial software systems or ERPs in large complex organizations
- Experience working in a richly diverse school district and or in a culturally & linguistically diverse environment and have respect for team and the communities we serve
- Certification as a governmental budget administrator through GFOA, ASBO, AABPA, or CPA, or similar

KNOWLEDGE AND ABILITIES

- Demonstrates flexibility and innovation when faced with ambiguity
- Tenacity and a willingness to achieve the department and district mission
- Experience with building collaborative, coordinated, and supportive relationships
- Expertise in using Excel and Google Sheets to design pivot tables and other reports
- Strong financial acumen in the school's context, such as understanding the distinction between General and Bond dollars, awareness of Federal grants, and understanding impact of enrollment, attendance and per pupil expenditures

CROSS GROUP COORDINATION

- Effectively coach, mentor and train staff, individually and collectively
- Ability to motivate, influence and optimize senior leadership, stakeholders and peer groups
- Experience and credibility as a leader in an environment where the ability to influence, work across a complex matrix, and build relationships is critical
- Influences others without direct authority to achieve solutions to meet organizational objectives, and is proactive in providing solutions, resolving issues and overcoming hurdles to get results
- Establish and maintain effective working relationships with all levels of District management, board members, other governmental officials, contractors, vendors, employees, and the general public

Special Requirements:

Work hours will occasionally include irregular hours, evening and weekend meetings and district functions, particularly during the budget development period of February through June.

WORKING CONDITIONS

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

Work Environment: Work is performed primarily in a standard office environment.

Hazards: Potential conflict situations.

Physical Demands: Primary functions require sufficient physical ability and mobility to work in an office setting; dexterity of hands and fingers to operate a computer keyboard and other office equipment; sitting or standing for extended periods of time; kneeling, bending at the waist, reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies; lifting, pushing, pulling and carrying office equipment, supplies and materials weighing up to 25 pounds; repetitive hand movement and fine coordination to use a computer keyboard; hearing and speaking to exchange information in person or on the telephone; seeing to read, prepare and assure the accuracy of documents.

FLSA: Exempt

Approval Date: April 1, 2016

Bargaining Unit: N/A

Revised Date: September 16, 2021

Salary Grade: 45

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service (Board of Education Policy 1.80.020-P).

Human Resources partners with district leadership to recruit, develop, and support a culturally diverse workforce dedicated to the highest standards of equity and achievement that creates an environment of empowerment and success for our students, employees, and the communities we serve.