



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, organize, direct and oversee the work of professional, technical and support staff performing budget data and policy analysis and related activities.
- Serve as a point-of-contact in the annual budget development process; prepare and present recommendations regarding the annual and biennium general fund operating budgets. "E"
- 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. "E"
- Participate in the oversight, preparation, administration and control of District budgets including general and special funds; provide internal guidance to district leaders to maintain budgetary controls; review internal audit documents and findings to ensure budget controls are implemented in accordance with fiscal best practices, District policies and procedures and local, state and federal laws. "E"
- Participate in development of the annual budget; ensure that budget documents are submitted for public hearings, Board adoption and forwarded to appropriate agencies in accordance with local, State and federal laws. "E"
- 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. "E"
- Monitor budget allotment and reserve plans to assure compliance with District policies and objectives; monitor expenditures according to budget allocations/appropriations; direct adjustments as needed. "E"
- Direct staff in the compilation of statistical, fiscal, and program information for the formulation and administration of budgets and budgetary allocations. "E"
- Analyze and oversee analysis of local bond, federal and state funds; review and develop financial forecasts and estimate future outcomes; develop and coordinate funding recommendations, justifications, and alternatives for funding of agency programs to meet current and evolving needs. "E"
- Provide support and assistance to District leaders in the preparation of budgets, including the interpretation of budget policies; provide recommendations on budget and financial objectives. "E"

- Prepare, assemble, and direct staff in the preparation and assembly of fiscal and statistical data, charts, graphs, and reports for use in budgetary and program evaluations and budget hearings. “E”
- Direct the conduct of analytical studies and fiscal investigations of complex and sensitive financial or organizational issues; oversee and prepare written and oral reports with recommendations for action. “E”
- Demonstrate a commitment to the Portland Public Schools Equity Initiative by developing a thorough knowledge and application of the district Racial Educational Equity Policy, Equity in Public Purchasing and Contracting and other board policies; participate in staff development, in-services and trainings related to diversity, equity and inclusion in the workplace and in K – 12 education; model appropriate behaviors; develop, recommend and implement improvements to business practices with awareness and understanding of their impact in a racially and culturally diverse community. “E”
- Attend, participate in, represent the District and/or lead meetings, workshops, seminars and in-services related to public agency budgeting and government financial services. “E”
- Supervise the performance of assigned staff, including interviewing, selecting, evaluating and training employees; recommend transfers, reassignment, termination and disciplinary actions. “E”
- May serve as a District representative in collective bargaining and negotiations. “E”
- 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.

DISTINGUISHING CHARACTERISTICS OF THE CLASS

The Budget Director plans and coordinates staff and services of District fiscal activities involving areas such as budget preparation and administration, position control, classification of accounts, expenditure projections and revenue estimating, mandated reporting, appropriation transfers and advising District administrators on the development and administration of site and department budgets. This employee is a highly skilled professional expert, who directs professional, technical and support staff in ensuring that budgets are accurately identified and administered, in accordance with District policies, procedures, and local, State and federal laws.

EMPLOYMENT STANDARDS

Knowledge of:

Generally accepted accounting principles, practices and procedures and related regulations.
 Financial analysis and projection techniques, and financial reporting procedures.
 Collective bargaining agreements and related fiscal impacts.
 Principles, practices, tools and techniques of budget and financial analysis and project management.
 Principles and practices of governmental accounting and research methods applicable to the budget process.
 Budgetary and fiscal systems software used in developing and monitoring District budgets.
 Principles, theories and practical application of public agency budgeting.
 District organization, operations, policies and objectives.
 Techniques and principles of high-quality customer service.
 Internal consulting concepts and practices.
 Current technologies, statistical, financial, budgeting, spreadsheet, word processing and presentation software.
 Effective written and oral communication and presentation techniques.
 Current local, state and federal budget and finance issues related to governmental agencies and K–12 public education.
 Elements of effective leadership and supervision.

Ability to:

Oversee, prepare, analyze and monitor District budgets.
 Prepare and interpret complex financial reports and statements.
 Organize and present clear and concise reports of findings and recommendations related to assigned activities.
 Direct and supervise the work of professional, technical and support staff.

Understand, interpret, apply and explain complex laws, rules, regulations related to governmental budgeting.
Provide budget training and internal consultation services.
Adapt to changing work priorities while meeting timelines and deadlines.
Model ethical behavior and communicate high expectations of ethical behavior to others.
Maintain confidentiality of highly sensitive information.
Act judiciously under pressure.
Communicate effectively both orally and in writing.
Operate a variety of office machines, technologies and software.

Education and Training:

A Bachelor's degree in Finance, Accounting, Business Administration, Economics, Public Administration, or related field and professional certification as a governmental budget administrator through GFOA, ASBO, AABPA or CPA, or similar certification is required.

Experience:

Five (5) years of experience developing, monitoring, analyzing and overseeing highly complex budgets in excess of \$100 million in a full-service public agency, two of which must have included direct management of professional staff, is required.

Experience working in a richly diverse school community and environment is preferred.

A Master's degree in one of the above-identified fields may substitute for two years of the required experience.

Special Requirements:

Work hours will occasionally include irregular hours, evening and weekend meetings and district functions.

Any other combination of training and experience which demonstrates the applicant is likely to possess the required skills, knowledge and abilities may be considered.

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 an office environment.

Hazards: Potential conflict situations.

Physical Demands: Primary functions require sufficient physical ability and mobility to work in an office; dexterity of hands and fingers to operate a computer keyboard and other technologies and office equipment; sitting, standing and walking for extended periods of time; kneeling, bending at the waist; lifting, pushing, pulling and carrying equipment, supplies and materials weighing up to 25 pounds; repetitive hand movement and fine coordination to use a computer keyboard; emotional stability to work effectively under pressure and to keep all aspects of the job under control; hearing and speaking to exchange information in person or on the telephone; seeing to read, prepare and assure the accuracy of documents.

FLSA: Exempt
Bargaining Unit: N/A
Salary Grade: FS Director - 45

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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