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## DIRECTOR – FINANCIAL SYSTEMS AND SUPPORT SERVICES (FINANCIAL SERVICES DIRECTOR)

### **BASIC FUNCTION**

Under administrative direction, direct operations and staff involved in the expert and responsive delivery of Financial Services information systems technologies and web applications, publications services and records archives, retention and management; serve as a professional expert for financial services technologies and assigned operational disciplines; manage new technologies, technology upgrades, modification and enhancement projects; collaborate through cross-functional teams to manage employee ensure the efficient and effective delivery of services.

### **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.*

- Direct and oversee the work of staff engaged in providing technical support and expertise for the district's financial services information systems, records management, archives and retention and publications services contracts and staff; evaluate and establish priorities in a highly dynamic environment. "E"
- Lead the preparation of proposals to develop new technology systems and/or operational changes; develop, implement, and modify systems' requirements; manage and coordinate the integration of financial systems technologies with other district systems. "E"
- Direct and oversee staff in the maintenance of internal database files and tables and the development of custom reports to meet the requirements of department and District staff and local, State and federal agencies. "E"
- Direct staff in the performance of professional and technical duties in support of the department's operational functions and activities related to managing the District's copier fleet and imaging services. "E"
- Identify, develop, and implement Human Resources policies and guidelines regarding the department operational support activities; ensure actions and activities are in compliance with current Financial Service's policies and guidelines. "E"
- Identify opportunities for improving functional areas processes through operational and information systems changes; lead and participate on cross-functional teams to coordinate and communicate with other departments and IT regarding system issues; processing; upgrades and enhancements; communicate with finance department users to assure appropriate system usage. "E"
- Develop training curriculum and conduct formal and informal training regarding the human resources information system; Identify training needs of end users; develop and provide the necessary training to meet those needs. "E"
- Confer with vendors, users, department staff, and others in developing, testing and evaluating new reprographic and imaging system devices, software and system upgrades, reviewing and revising processes and procedures, troubleshooting and resolving system issues; develop timelines for the completion of work orders, reprographic, imaging and technology modifications and/or systems and ensure staff, contractors and vendors meet milestones, timelines and deadlines in compliance and accordance with contracts, commitments and performance standards. "E"
- Manage staff activities and priorities to ensure that Financial Services contributions to Federal and State reporting requirements are fulfilled, including data gathering, auditing, report creation and validation; assign work and provide support to staff to enable the gathering of information for inclusion in required reports. "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 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 human resources practices with awareness and understanding of their impact in a racially and culturally diverse community. *“E”*
- Participate in, lead and manage development of proposals for publication services and support contracts and related goods and services and manage approved contracts and budgets in accordance with local, State and federal laws and District policies. *“E”*
- Review and monitor purchases and supplies for assigned functions to ensure appropriate and adequate inventories. *“E”*
- Ensure safe operations, equipment and noise levels within print shop; check and monitor cleanliness of facility, potential hazards, ventilation and air flow, and related safety measures; arrange for repair, replacement and physical plant modifications to comply with safety standards; work with designated District safety management staff to develop and deliver effective safety-on-the-job trainings. *“E”*
- Supervise the performance of assigned personnel; interview, select, train and mentor employees and recommend transfers, reassignment, termination and disciplinary actions. *“E”*
- Maintain current knowledge of best practices and legal requirements for PK-12 schools and public agency records release, distribution and retention; develop, participate in and deliver trainings to ensure that department and District staff are up-to-date and trained in changes in records release and retention laws. *“E”*
- Attend and participate in a variety of conferences, in-service trainings and meetings. *“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 Director – Financial Systems and Support Services directs the staff and services of the Financial Services information systems, publication and records management operational and support services. This employee provides expertise and serves as both a technical and operational expert over assigned functions.

### **EMPLOYMENT STANDARDS**

#### Knowledge of:

School business processes and financial services information systems software and applications.  
 Oracle PeopleSoft systems payroll, purchasing, budget and accounting modules, technologies and applications.  
 Microsoft Office Suite word processing, spreadsheet, data base and presentation software applications.  
 Advanced Excel spreadsheet applications.  
 Student and business records release and retention laws in PK-12 public schools, such as FERPA and Oregon Public Record laws.  
 Techniques and principles of high-quality customer service.  
 Public agency contracting and procurement laws, policies and procedures.  
 Safety regulations for assigned work areas and equipment.  
 Project management applications, software and technologies.  
 District Equity in Purchasing and Contracting policies.  
 Budgeting techniques.  
 Effective leadership and performance management techniques.  
 Oral and written communication techniques.  
 District policies, procedures, and organizational structure.

#### Ability to:

Map organizational and technical processes to eliminate redundancies and improve efficiencies.  
 Provide technical expertise in financial service’s management operations, systems and applications.  
 Effectively plan, schedule, and coordinate multiple projects, divisions and staff in a complex, fast-paced, multiple-priority work environment.  
 Operate a variety of technologies and software.  
 Stay current on new technologies and applications as they emerge.  
 Develop, understand, interpret, and apply technical material, rules, procedures, and policies.

Communicate technical concepts and procedures to a variety of technical and non-technical audiences.  
Develop, modify and deliver user-friendly training.  
Supervise projects in a computer technology environment.  
Ensure a safe and secure working environment for assigned areas and staff.  
Establish and maintain effective working relationships.  
Make sound and reasonable decisions in accordance with laws, ordinances, regulations and established procedures.  
Direct, manage and evaluate the work of assigned staff.  
Demonstrate integrity, ingenuity and inventiveness in the performance of assigned tasks.  
Deliver a high-level of customer service to district stakeholders.  
Advocate, model, learn and implement Portland Public School's Racial Equity Initiative.  
Communicate effectively both orally and in writing.  
Analyze situations accurately and adopt an effective course of action.  
Maintain confidentiality and demonstrate discretion, initiative and good judgment.

**Education, Training and Experience:**

A Bachelor's degree in Information Technology, Business Administration, Public Administration or related field and four (4) years of experience working with Financial Services Management Systems and demonstrated proficiency in Microsoft Excel and Oracle™ PeopleSoft Financial Management or similar Enterprise Resource Planning software, two (2) years of which must have included experience serving in a supervisory or lead role, is required. Experience in K-12 public education or a large, multi-unit public sector organization is highly desirable.

An Associate of Arts degree in one of the identified majors and six (6) years of the required will substitute for the Bachelor's degree.

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.

**Special Requirements:**

Positions in this classification may require the use of a personal automobile and possession of a valid driver's license.

**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, print shop and warehouse environment with frequent interruptions.

**Hazards:** Potential conflict situations; noise and volume levels typically reached in a commercial print shop.

**Physical Demands:** Primary functions require sufficient physical ability and mobility to work in an office, print shop and warehouse setting; dexterity of hands and fingers to operate a computer keyboard and other office equipment, including large scale commercial copiers; sitting, standing and walking for extended periods of time; kneeling, bending at the waist; lifting, pushing, pulling and carrying copiers, office equipment, supplies and materials weighing in excess of 100 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.

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

Approval Date: March 30, 2016  
Revised December 6, 2016

*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*