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**FINANCIAL SERVICES MANAGER  
FINANCIAL SERVICES MANAGER II  
FINANCIAL SERVICES MANAGER III**

**BASIC FUNCTION**

Under administrative direction, manage the functions, operations, activities and staff of one or more divisions of the District's Financial Services Department, such as payroll, treasury, accounting, bonds, grants, budget, purchasing, contracting, accounts payable, risk management, receivables, auditing, records management, reprographics and related functions; develop and recommend policies and procedures to support areas of specialization; direct and supervise staff to assure that assigned operations and District funds are accurately accounted for and are in compliance with District policy, local, State and federal laws.

**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.*

- Manage and oversee the functions and staff of one or more designated divisions within the Financial Services Department, such as payroll, treasury, accounting, bonds, grants, budget, purchasing, contracting, records management, reprographic services, accounts payable, risk management, receivables, auditing, and related functions. "E"
- Support, participate in, recommend, develop, implement, monitor and revise policies and procedures ensuring compliance with District policies and local, State and federal financial reporting requirements; oversee and prepare a variety of routine-to-complex financial and operational records and statements for internal, external and public reporting. "E"
- Manage and oversee staff and activities in completion of assigned projects; coordinate resources and timelines related to assigned staff, activities and projects; manage, monitor and support assigned programs and projects from implementation through completion. "E"
- Lead and manage staff in, and perform the analysis, measurement and reporting of financial and operational activities within functional areas of responsibility; prepare and manage preparation of a variety of scheduled, regular, periodic and ad hoc financial statements, reports, distributions and balances for various accounts financial positions, operating results and similar information. "E"
- Provide leadership and technical expertise in assigned functional areas and serve as a technical resource to district leadership, department management, staff and District stakeholders to ensure accurate operational, accounting and financial management of District resources. "E"
- Maintain current knowledge of laws related to assigned financial disciplines; champion best-practices in developing and deploying assigned functions operations, financial reporting and accountability systems and structures to maximize fiscal compliance, accuracy and efficiency. "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 educational business practices with awareness and understanding of their impact in a racially and culturally diverse community. “E”

- Participate in the development of department strategic plans, policies, procedures and programs related to the delivery of services to users; implement direction and objectives for assigned division and staff; initiate, coordinate and enforce district systems, policies and procedures to assure compliance with applicable local, state and federal rules and regulations. “E”
- Manage staff and oversee implementation of operational systems to ensure that projects are performed and completed within assigned budgets; authorize and control expenditures in accordance with established policies and procedures as appropriate. “E”
- Manage, monitor and evaluate staff progress toward meeting assigned divisions’ and department goals; define, develop, evaluate and implement objectives, work plans, schedules and commitment of resources to ensure that outcomes meet reporting needs, expectations and goals; coordinate and verify completion of Federal, state and District administrative reports, as appropriate. “E”
- Supervise and evaluate the performance of professional, technical and support staff, communicate job expectations, train, coach, counsel and discipline employees; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. “E”
- Maintain and oversee maintenance of a wide variety of operational and financial information, databases, spreadsheets, fiscal and statistical data, charts, graphs, files, records and reports for the purpose of ensuring the availability of documentation and compliance with established policies and regulatory guidelines. “E”
- Develop, lead, deliver, participate in and represent the District at a variety of meetings, in-service training, seminars and workshops to gather and provide information required to maintain current knowledge and expertise essential to department and District staff in performing financial activities. “E”
- Perform, manage and lead a variety of special projects related to process improvement planning and work flow management; serve as division and department representative on interdepartmental and cross-functional teams to effect positive communications and changes in work flow management; work closely with division director to support program, process and staff efficiencies. “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**

All levels of Financial Services Manager manage the day-to-day operations and staff of one or more disciplines within the District’s financial services department. Levels are differentiated by the overall complexity of assigned areas of specialization, levels of technical knowledge, expertise and professional certifications necessary to perform and manage the essential functions of the assigned disciplines, levels of professional, technical and support staff supervised, budget authority, independence and discretion in decision-making, and expectation and focus on the development and deployment of business practices, policies, procedures and process improvement and efficiency strategies over assigned areas.

### **EMPLOYMENT STANDARDS**

#### Knowledge of:

Principles, practices, tools and techniques of government purchasing, contracting, public records retention, maintenance and privacy, accounting, financial analysis, auditing and project management, as related to assigned functions.

Process and workflow management systems.

Generally accepted accounting practices for federal reporting entities.

Governmental audit requirements for designated financial services’ disciplines.

Governmental Accounting Standards Board standards of state and local governmental accounting and financial reporting related to assigned operations.

State, federal and local laws, regulations and court decisions applicable to K-12 public school financial management.

District organization, operations, policies and objectives.

Techniques and principles of high-quality customer service.

Internal consulting concepts and practices.

Current technologies, accounting, statistical, financial, spreadsheet, word processing and presentation software.

Effective written and oral communication and presentation techniques.

Competencies for effective leadership and supervision.

Ability to:

Manage plan, organize and administer assigned area(s) of the District's financial services, staff and activities.

Perform and oversee staff in performing basic-to-complex accounting, auditing and analyses of a variety of financial accounts and operations.

Lead and analyze financial services operations and processes, identify and implement practices and procedures that streamline processes, eliminate redundancies and enhance overall efficiencies.

Lead staff in, and develop, financial spreadsheets and databases and use project management, accounting, audit and analytical software.

Understand, interpret, apply and explain complex state and federal policy, law, regulation and court decisions applicable to school business and financial operations.

Develop and manage staff in the implementation of fiscal policies, audit procedures, purchasing, contracting, and public and fund accounting systems.

Lead, oversee and prepare a variety of operational, financial and statistical compliance, accountability and informational reports.

Maintain current knowledge of and advocate for best practices in financial operations management, controls and accountability.

Lead and manage the development and implementation of assigned divisions' practices, policies and procedures.

Communicate effectively with non-accounting/financial personnel to explain operational and accounting requirements.

Provide internal consultation services.

Prepare and present basic-to-complex data in written and oral reports.

Analyze data utilizing a variety of routine-to-complex processes.

Set and adapt to changing work priorities, while meeting deadlines and timelines.

Advocate, model, learn and implement Portland Public School's Racial Equity Initiative, Equity in Public Purchasing and Contracting policy and other Board Policies.

Supervise, plan and evaluate the work of others.

Deliver a high-level of customer service to district stakeholders.

Communicate effectively both orally and in writing.

Maintain confidentiality and demonstrate discretion, initiative and good judgment.

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, Training and Experience:**

The Financial Services Manager requires a Bachelor's degree in Accounting, Finance, Business Administration, Economics, Statistics, Public Administration or a related field and three (3) years of professional technical experience in the assigned discipline. Supervisory experience is highly desirable.

The Financial Services Manager II requires a Bachelor's degree in Accounting, Finance, Business Administration, Economics, Statistics, Public Administration or a related field and three (3) years of professional technical experience in the assigned discipline, including developing policies and procedures, monitoring and reporting on agency activities and compliance, and one (1) year supervising technical and/or support staff in the performance of financial management programs.

The Financial Services Manager III requires a Bachelor's degree in Accounting, Finance, Business Administration, Economics, Statistics, Public Administration or a related field and four (4) years of public agency professional technical experience in the assigned discipline, including developing policies and procedures, monitoring and reporting on agency activities and compliance, and two (2) years managing professional staff in the performance of financial management programs.

AND

Certification appropriate to the designated disciplines, such as Certified Public Accountant (CPA), Certified Management Accountant (CMA), Certified Professional Public Buyer (CPPB), Certified Public Procurement Officer (CPPO), Certified Payroll Professional (CPP), Certified Records Manager (CRM), Certified Treasury Professional (CTP) or similar certification related to the assignment, is required of the Financial Services Manager III at time of appointment; the above certifications are preferred at the Manager and Manager II level.

A Master's degree in one of the above-identified fields may substitute for one (1) year of the required experience.

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

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; 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

Approval Date: December 6, 2016

Bargaining Unit: N/A

Salary Grade: Mgr – 36; Mgr II – 39; Mgr III-42

*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