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## CHIEF FINANCIAL OFFICER

### **BASIC FUNCTION**

Under policy direction, plan, organize and direct portfolio of activities including Budget, Finance, Publication Services, Risk Management and Purchasing; provide strategic financial consulting services in support of District programs; oversee administration of a District annual budget of approximately \$600 million, in addition to a range of another \$300 - \$ 600 million in capital grant and expansion bonds.

### **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, organize, control, integrate and evaluate the work of the Financial Services branch, with over-all responsibility for the Accounting, Audit, Budget, Risk Management, Payroll, Purchasing & Contracting, Records Management and Grant Development and related activities of the division. “E”
- Provide strategic expertise and information regarding division activities and participate in the formulation of policies, procedures and programs; advise on trends or challenges and recommend appropriate courses of action. “E”
- Oversee preparation, administration and control of District budgets including general and special funds; provide internal guidance to district leaders to maintain budgetary controls; oversee conduct of internal audits to ensure program operations are within budget and in accordance with fiscal practices, local, state and federal laws. “E”
- Serve on the Superintendent’s cabinet as directed by the Deputy Chief Executive Officer and participate in providing leadership and professional expertise in the ongoing development, execution and evaluation of the District’s strategic planning initiatives to ensure optimal conditions for student success through the collaboration and visionary leadership of the Governing Board of Directors, Deputy Chief Executive Officer, Superintendent of Schools, and community stakeholders. “E”
- Provide internal consultation services and recommend financial policies to the Deputy Chief Executive Officer, Superintendent of Schools and Board of Education. “E”
- Provide support to District divisions, internal and external stakeholders in assessing the financial impact of legislation, ballot measures, negotiations and related matters; direct the analysis of impending legislation and recommend new and revised legislation language to assure business and financial services laws which enhance the District’s educational mission. “E”
- Implement and evaluate programs, plans, processes, systems and procedures to achieve District goals for business and financial services. “E”
- Oversee the design and implementation of internal control procedures over the District’s financial activities; assess compliance with financial regulations and controls through the oversight of internal audits of District use of resources, analyzing records, reports, operating practices, and documentation; direct the development and revision of practices, policies and procedures to ensure compliance with local, state and federal laws relating to school business functions, bond construction and reconstruction funding, financial accounting, and related activities. “E”

- Analyze, develop and review reports of findings, alternatives and recommendations involving a broad range of revenue, financing, business operations, financial planning and financial and business management issues. “E”
- Deliver presentations to District management, Board of Education, District employees, the general public and others on District financial and business status and operations. “E”
- Prepare a wide variety of materials to document activities and issues, meet compliance requirements and provide supporting materials for requested actions; prepare GASB financial statements and footnotes for the purpose of showing compliance to the auditors. “E”
- Participate in collective bargaining negotiations and advise District administration regarding financially related issues and impacts. “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”
- Facilitate meetings, workshops, seminars and in-services; represent the District in a variety of local community based organizations and coalitions to effect positive dialogue and relations in school business and financial matters; at local, state and national organization meetings and conferences relating to school business and financial management. “E”
- Supervise the performance of assigned personnel; interview, select, evaluate and train employees and recommend transfers, reassignment, termination and disciplinary actions. “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 Chief Financial Officer is responsible for managing, directing and integrating a full spectrum of broad and comprehensive financial services for the school District, providing expertise, leadership and guidance to division staff and activities. This classification is the direct supervisor for the Deputy Chief Financial Officer. The Deputy Chief assumes leadership over division programs and staff as assigned by the Chief Financial Officer. This classification ensures a responsibility to students, parents, staff and community stakeholders to provide transparent accountability for use of public funds, integrity of the District’s financial reports and solvency in accordance with state and federal law.

**EMPLOYMENT STANDARDS**

Knowledge of:

Principles and practices of public administration, intergovernmental relations, school business operations and financial management.

Principles, theories and practical application of bond funding, federal special funding programs and grants and public agency budgeting techniques.

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

District organization, operations, policies and objectives.

Principles, practices, tools and techniques of financial analysis and project management.

Principles and practices of negotiations and collective bargaining.

District labor organizations and collective bargaining agreements.

Techniques and principles of high-quality customer service.

Internal consulting concepts and practices.

Principles and practices of effective leadership, management and supervision.

The ethnic, cultural, geographic, and socio-economic diversity of the populations served by the District.

Current technologies, statistical, financial, spreadsheet, presentation software.

Effective written and oral communication and presentation techniques.  
Elements of effective leadership and supervision.  
Current local, state and federal issues related to Portland Public Schools and K–12 public education.  
District priorities and goals.

**Ability to:**

Plan, direct and integrate a broad range of complex business and financial planning, budgeting and service programs and activities.  
Understand, interpret, apply and explain complex state and federal policy, law, regulation and court decisions applicable to school business and financial operations.  
Develop and implement fiscal policies, audit procedures, public and fund accounting systems.  
Manage and oversee preparation and monitoring of District budgets.  
Analyze processes and problems, identify opportunities for improvement and follow through on changes in a timely and consistent manner.  
Provide internal consultation services.  
Present information regarding District programs in a proactive, comprehensive manner.  
Develop strategic, long-term financial plans.  
Prepare and present complex data in written and oral reports, and represent the District in a variety of public settings.  
Analyze data utilizing a variety of complex processes.  
Set and adapt to changing work priorities.  
Provide leadership by building, directing and motivating a diverse workforce.  
Manage and supervise staff and operations.  
Advocate, model and implement Portland Public School's Racial Educational Equity Initiative and board policies.  
Manage and oversee the PPS Equity in Public Purchasing and Contracting board policy and related procedures.  
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 Master's degree in Finance, Accounting, Business Administration, School Business Administration, Public Administration, or related field and certification as a CPA, CMA or CGFM is required.

**Experience:**

Ten (10) years of business or financial operation administration management experience in a full-service school district or a full-service municipal, State or Federal public agency with an annual budget of \$100 million or greater is required. At least three of these years must have been in a senior administrative management capacity, overseeing multiple financial operations, functions and staff.

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

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

Special Requirements:

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

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

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

**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.

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FLSA: Exempt  
Bargaining Unit: N/A  
Salary Schedule: SL200

Approval Date: May 7, 2014  
Revised : December 16, 2015; May 5, 2017

*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*