



DEPUTY CHIEF FINANCIAL OFFICER

BASIC FUNCTION

Under direction of the Chief Financial Officer, plan, organize and direct the day-to-day operations, staff and activities of the Finance, Budget and Purchasing of the District; provide operational and technical expertise to department staff and District stakeholders to support sound financial policy and funding allocations which meet programmatic objectives.

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 finance, budgeting, purchasing and related activities of the Financial Services Department. “E”
- Provide technical expertise to District and site administrators, managers, and supervisors regarding District financial matters; interpret and explain laws, practices, rules, regulations, policies, procedures; develop and lead staff in solving unique problems specific to District finances. “E”
- Plan, conduct and direct general and administrative studies relative to present and future financial needs of the District. “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; participate in the oversight of internal audits to ensure program operations are within budget and in accordance with fiscal practices, local, state and federal laws. “E”
- Participate in providing support to District divisions, internal and external stakeholders in assessing the financial impact of legislation, ballot measures, negotiations and related matters; oversee analysis and analyze proposed legislation and recommend new and revised legislation language to assure business and financial services laws which enhance the District’s educational mission. “E”
- Review, evaluate, and conduct procedural studies of existing work methods and operations, coordinate workflow processes between operational divisions; review and analyze processes as they may overlap; recommend and implement streamlining methods, process and operational improvements; lead and work with District Financial Services management teams to develop and/or change policies and procedures for efficient and effective service delivery. “E”
- Participate in and lead the planning, coordination and implementation of short and long term operational goals and objectives for Fiscal Services operations; work with management team to communicate and implement short and long term goals and objectives. “E”
- Assure compliance with local, state and federal laws relating to public PreK – 12 schools’ financial accounting and related activities. “E”
- Provide technical expertise and information regarding department activities and lead and participate in the formulation of policies, procedures and programs; advise on trends or challenges and recommend appropriate courses of 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”

- Prepare and oversee the preparation and maintenance of a variety of presentations, reports, records and files related to assigned activities. “E”
- Lead and participate in the development of assigned budgets; recommend and approve expenditures in accordance with established policies and guidelines. “E”
- Supervise and monitor the performance of assigned personnel; interview and select employees, establish performance requirements and personal development targets; provide coaching for performance improvement and recommend transfers, reassignment, termination and disciplinary actions. “E”
- Participate on and assume a leadership role with a wide variety of committees, work groups, task forces and other internal and external stakeholder teams; represent the District in professional groups and organizations. “E”
- Participate in the delivery of presentations to District management, Board of Education, District employees, the general public and others on District financial and business status and operations. “E”
- Participate in collective bargaining negotiations and advise District administration regarding financial issues and impacts, as assigned. “E”
- May serve as Chief Financial Officer in their absence.
- 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 Deputy Chief Financial Officer is responsible for management and oversight of the day-to-day activities, operations, programs and staff of the Financial Services Department, providing technical and operational expertise, leadership and guidance to division staff and activities. This classification develops and operationalizes best practices methods of financial accounting which provide transparent accountability for use of public funds.

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 participate in oversight, 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 and implement strategic short-term and long-term goals and objectives for District financial services.
Prepare and present complex data in written and oral reports.
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.
Direct, manage and supervise staff and operations.
Advocate, model and implement Portland Public School's Racial Educational Equity Initiative and board policies.
Participate in the management and oversight of 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, Public Administration, or related field is required. CGFM, CPA or CMA certification is preferred.

Experience:

Seven (7) 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 is 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.

FLSA: Exempt
Bargaining Unit: N/A
Salary Schedule: SL100

Approval Date: March 30, 2016
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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