



## **Controller**

### **BASIC FUNCTION**

Under administrative direction, and reporting to the Senior Director of Finance, the Controller is responsible for overseeing the accounting activities in Portland Public Schools including the District's financial plans and policies, its accounting practices, and the conduct of its relationships with leading institutions and the financial community. The role directs operations and staff in accounting, accounts payable and receivable, general ledger, and treasury functions. The Controller plays a key role in ensuring accuracy and compliance in financial reporting, developing financial strategies, and providing insightful analysis to support informed decision-making.

### **REPRESENTATIVE DUTIES**

*This description does not describe all duties performed. This summary provides examples of typical tasks performed.*

#### **Financial Reporting and Analysis**

- Prepare and oversee the preparation of accurate and timely financial statements, reports, and forecasts.
- Ensure compliance with accounting principles, standards, and regulatory requirements. "E"
- Review and approve financial reports, including balance sheets, fund balance reports and cash flow statements. "E"
- Conduct financial analysis to identify trends, variances, and opportunities for improvement. "E"
- Provide detailed financial insights and recommendations to senior management for strategic decision-making. "E"

#### **Budgeting and Forecasting**

- Collaborate with the budget team, including forecasting financial performance and tracking variances. "E"
- Provide financial analysis and insights to support budgeting decisions and financial planning. "E"

#### **Accounting Operations**

- Oversee daily accounting operations, including accounts payable, accounts receivable, general ledger, accounting and treasury. "E"
- Maintain the chart of accounts in accordance with state standards; actively participate in relative Oregon Department of Education committees; coordinate closely and effectively with Budget and Grant Accounting on the proper use of account codes. "E"
- Ensure the accuracy and completeness of financial records and transactions. "E"
- Implement and maintain effective internal controls to safeguard district assets. "E"

- Oversee debt management of the District, including both short-term borrowings (TAN's, lines of credit) and long-term debt (G.O. Bonds, Certificates of Participation, etc.); ensure timely debt service payments.

### **Audit and Compliance**

- Coordinate and manage external audits and ensure timely completion of audit requirements. "E"
- Ensure adherence to all financial regulations, policies, and procedures. "E"
- Address audit findings and implement corrective actions as needed. "E"
- Analyze accounting regulations issued by the Government Accounting Standards Board for impact on District financial statements. "E"

### **Team Leadership and Policy Development**

- Supervise the performance of assigned personnel; interview, select, train and mentor employees and recommend transfers, reassignment, termination and disciplinary actions. "E"
- Foster a collaborative and efficient working environment within the finance department. "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.
- Develop and implement financial policies and procedures to improve efficiency and effectiveness. "E"
- Ensure all financial policies and procedures are up-to-date and aligned with industry best practices. "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 training 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 training and meetings. "E"
- Perform related duties as assigned.

### **Cash Management**

- Oversee cash flow management and optimize liquidity to support operational needs and financial stability. "E"
- Manage investments including investment options and financial risk management. "E"
- Manage banking relationships, financing arrangements, and other providers of financial services. "E"

### **Systems and Technology:**

- Utilize accounting software and financial systems to streamline processes and improve reporting accuracy.
- Evaluate and implement new technologies and systems to enhance financial operations for Portland Public Schools. "E"

*Note: See the Classification Specification which identifies essential duties required. This is strictly for use in compliance with the Americans with Disabilities Act.*

**KNOWLEDGE AND ABILITIES**

*The following knowledge and abilities are in addition to those outlined in the classification.*

*Knowledge of:*

- Controller, accounting, and treasury best practices.
- Governmental audit requirements.
- The distinction between General and Bond dollars, awareness of Federal grants, and understanding impact of enrollment, attendance and per pupil expenditures.
- Governmental Accounting Standards Board standards of state and local governmental account and financial reporting.

*Ability to:*

- Present financial information clearly to various stakeholders.

**EDUCATION AND EXPERIENCE**

Education: Bachelor's degree from an accredited college or university, with a major in Accounting, Finance, Business Administration, or related field.

- Four (4) or more years of experience leading accounting functions including accounts payable, general ledger and treasury in a highly complex, large organization with a budget in excess of \$50 million.
- Two (2) years of supervising professional staff is required.

Certification as a governmental budget administrator through GFOA, ASBO, AABPA, or CPA, or similar is strongly preferred.

Experience working in a unionized environment is preferred. Experience working in a richly diverse school district and or in a culturally & linguistically diverse environment and having respect for team and the communities we serve is highly desirable.

*Any other combination of education and experience that would likely provide the required knowledge and abilities may be considered.*

**Special Requirements:**

Work hours may include on- and off-campus evening and weekend activities and meetings and district functions.

**WORKING CONDITIONS**

*The working conditions are outlined in the job classification for the position and 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.

**Remote Work Eligibility:** Hybrid.

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FLSA:	Exempt	Approval Date:	March 30, 2016
Classification:	Director - Financial Systems and Support Services	Revised Date(s):	December 6, 2016
Job Title:	Controller		September 2024
Job Code:	1851		
Bargaining Unit:	Non-Represented		
Salary Grade:	45		
Work Year(s):	260		

**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).

Human Resources partners with district leadership to recruit, develop, and support a culturally diverse workforce dedicated to the highest standards of equity and achievement that creates an environment of empowerment and success for our students, employees, and the communities we serve.