

VISTA UNIFIED SCHOOL DISTRICT
EXECUTIVE DIRECTOR OF FISCAL SERVICES

Purpose Statement

The purpose of an Executive Director of Fiscal Services is to ensure efficient and cost-effective departmental operations, oversight, and administration of the District's fiscal programs; provide information and serve as a resource to others; achieve defined objectives by planning, evaluating, developing, implementing, and maintaining services in compliance with established guidelines; and serve as a member of the leadership team.

This job reports to the Assistant Superintendent of Business Services.

Essential Functions

- Advises and provides information, analysis, and recommendations to the Assistant Superintendent of Business Services for the purpose of ensuring congruence between District priorities and services from supervised departments.
- Analyzes a variety of financial information (e.g. budget variances, cost projections, accounting, purchasing, and print shop, etc.) for the purpose of providing direction and support, making recommendations, maximizing use of funds, and/or ensuring overall operations are within budget.
- Assists a variety of external agency personnel (e.g. auditors, grant representatives, regulatory agency staff, etc.) for the purpose of providing information and general support.
- Communicates and collaborates with internal and external personnel (e.g., District and site administrators and personnel, regulatory agencies, auditors, grant representatives, vendors, etc.) for the purpose of providing information and general support and implementing and maintaining services and programs.
- Conducts internal audits (e.g. general and special funds, etc.) for the purpose of ensuring program operations are within budget and in accordance with fiscal practices.
- Develops and maintains budget for fiscal year (e.g. budget allocations, expenditures, fund balances, related financial activities, etc.) for the purpose of ensuring that allocations are accurate, revenues are recorded, expenses are within budget limits and/or fiscal practices are followed.
- Facilitates meetings and workshops for the purpose of identifying issues, developing recommendations, supporting other staff, and serving as a District representative.
- Maintains and oversees the maintenance of a variety of manual and electronic fiscal information, files and records (e.g. accounts payable, accounts receivable, purchase orders, requisitions, student activities accounts, etc.) for the purpose of providing an up-to-date reference and audit trail.
- Manages assigned program and/or departmental responsibilities for the purpose of achieving organizational objectives, and ensuring compliance with legal, financial, and District requirements.
- Oversees operations, the maintenance of services, and the implementation of new programs and/or processes in the Fiscal Services, Payroll, Purchasing, and Print Shop departments for the purpose of providing services within established timeframes and in compliance with related requirements.

- Oversees the compilation of data from a wide variety of sources for the purpose of analyzing issues, ensuring compliance with federal, state, local, and District policies and procedures, and/or monitoring program components.
- Participates in meetings, workshops, and seminars for the purpose of conveying and/or gathering information required to perform functions.
- Performs personnel functions (e.g. interviewing, evaluating, supervising, etc.) for the purpose of maintaining adequate staffing, enhancing productivity of personnel, and achieving objectives within budget.
- Prepares a wide variety of materials for the purpose of documenting activities and issues, meeting compliance requirements, providing audit references, and providing supporting materials for requested actions.
- Presents information for the purpose of communicating information, gaining feedback, and ensuring adherence to established internal controls.
- Researches a variety of topics for the purpose of developing new programs/services, ensuring program compliance with established requirements, securing general information, and/or responding to requests.
- Responds to a variety of inquiries for the purpose of identifying the relevant issues and recommending or implementing a plan of action that will efficiently resolve the issue.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications

Skills, Knowledge and Abilities

SKILLS are required to perform multiple, highly complex, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include:

- adhering to safety practices;
- analyzing budgets;
- analyzing data;
- applying job-related codes, regulations, and laws;
- classifying data and/or information;
- effectively planning, organizing, and directing the services of assigned departments;
- facilitating meetings;
- operating standard office equipment and office technology;
- performing accounting procedures;
- performing bookkeeping procedures;
- preparing and maintaining accurate records;
- using office software applications including word processing, spreadsheets, presentation, and databases.

KNOWLEDGE is required to

- utilize theoretical mathematical concepts;
- review and interpret highly technical information,
- write technical materials and/or speak persuasively to implement desired actions;
- present information to others;

- analyze situations to define issues and draw conclusions;
- understand complex, multi-step written and oral instructions.

Specific knowledge based competencies required to satisfactorily perform the functions of the job include:

- accounting and bookkeeping principles;
- business telephone and email etiquette;
- concepts of grammar, spelling, and punctuation;
- cost/fund accounting;
- government accounting standards;
- interviewing techniques and practices;
- job-related codes/laws/rules/regulations/policies;
- keyboarding;
- methods of organizing, scheduling, and prioritizing workloads;
- methods of tactful, patient, and courteous interpersonal interactions;
- office equipment and technology;
- office practices and procedures;
- personnel administration practices;
- pertinent laws, codes, policies, and/or regulations;
- pertinent software programs;
- principles and practices of training;
- principles of public and fund accounting and budgeting;
- program planning and development;
- recordkeeping and record retention practices;
- school budgeting, policies, and audit procedures;
- school district organization, operations, policies, and objectives.

ABILITY is required to schedule a number of activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing a variety of complex processes; and operate equipment using a variety of standardized methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of widely varied types and/or purposes; and utilize a variety of types of job-related equipment. Independent problem solving is required to analyze issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited. Specific ability based competencies required to satisfactorily perform the functions of the job include:

- accuracy and attention to detail;
- adapting to changing work priorities;
- analyzing issues and determining an appropriate course of action;
- collaborate with parents, community members, and staff members;
- communicating with diverse groups and individuals;
- displaying tact and courtesy;
- establishing and maintaining effective working relationships with others;
- maintaining confidentiality;
- making arithmetic calculations quickly and accurately;
- meeting deadlines and schedules;
- multitasking;
- organizing tasks;
- principles of training;
- providing excellent customer service;
- reading, interpreting, explaining, and following rules, regulations, policies, and procedures;
- reading, writing, and communicating effectively in English;
- setting priorities;
- working as part of a team;
- working with detailed information/data.

Responsibility

Responsibilities include: working independently under broad organizational policies to achieve organizational objectives; managing multiple departments; supervising the use of funds for multiple departments. Utilization of significant resources from other work units is routinely required to perform the job's functions. There is a continual opportunity to significantly impact the organization's services.

Work Environment

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling and significant fine finger dexterity. Generally the job requires 70% sitting, 20% walking, and 10% standing. The job is performed in a generally clean and healthy environment.

Experience: Job related experience with increasing levels of responsibility is required.

Education: Bachelor's Degree in job-related area.

Equivalency: Bachelor's degree in accounting, business administration, public administration, or related field and five (5) years of professional accounting experience in a public agency with at least two (2) years in a supervisory capacity. School district experience highly preferred.

Any other combination of education, training, and experience that could likely provide the desired skills, knowledge, and abilities may be considered.

Retention: In accordance with Education Code 45301, an employee appointed to this class must serve a probationary period of two hundred sixty (260) days of paid regular service (excluding days absent for illness or injury) during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.

Required Testing

For those candidates who meet the minimum qualifications, the assessment process will consist of any one or more of the following: Screening for most qualified candidates, Training and Experience Evaluation, a Written Test, a Performance Test, and/or a Qualifications Appraisal Interview.

Certificates and Licenses

Valid California Driver License and evidence of insurability.

Continuing Educ. / Training

Clearances

Fingerprint and Background Clearance
Drug Test
Tuberculosis Clearance

FLSA Status

Exempt

Approval Date

Established:05/24/2012
Revised: 09/26/2016

Salary Grade

Classified Management, Range
29