



OFFICE OF HUMAN RESOURCES

Job Information	
Job Title: <i>Director II, Budget and Financial Planning</i>	Last Revised/Approved: <i>March 2018</i>
Job Code:	Reports To: <i>Chief Financial Officer</i>
Office: <i>Office of Finance</i>	Department: <i>Finance</i>

Compensation Information	
Pay Grade:	Pay Range:
FLSA Status: <i>Exempt</i>	Term of Employment: <i>FT</i>

Position Summary/Purpose:

Plans, organizes and coordinates the development, preparation, presentation, implementation and evaluation of the district's annual budget and long-range financial planning. Directs department staff and assigned teams in the development, design, review, implementation and periodic re-evaluation of assigned duties, project plans and strategies to support the achievement of the goals of the department.

Core Competencies:

- Decision Quality and Problem-Solving
- Communication and Customer Service
- Professionalism
- Equity, Access and Inclusion

Management Competencies:

- Developing Others
- Managing through Processes and Systems
- Strategic Agility and Innovation Management
- Functional/Technical Skills

Essential Functions:

An essential function is a duty or responsibility that is fundamental to the job — a critical, or basic component of that job. An essential function cannot or should not be assigned elsewhere.

Note: An Essential Function must meet the following criteria:

- ✓ *Does the job exist to do this function?*
- ✓ *Would taking this function from the job fundamentally change the job?*
- ✓ *Would there be significant consequences if this function were not performed?*
- ✓ *Can other employees do this function if necessary?*
- ✓ *How much time per week is spent doing this function?*
- ✓ *Do people in similar positions elsewhere do this function?*

- Under the direction of the Chief Financial Officer (CFO) plans and coordinates preparation of the District's annual budget and other financial documentation.

- Interacts with the Board of School Directors in the budgetary review and approval process. Prepares Board items and makes budget recommendations. Attends Board and Committee meetings to provide insight and expertise on the technical issues surrounding the budgets, financial management and forecasting.
- Leads and directs the work of the Finance Planning and Budget department. Reviews position responsibilities, plans division goals and ensures adequate staffing. Determines staff development needs and seeks or assists with the training. Maintains a climate which attracts and motivates a diverse staff of quality individuals.
- Collaborates with the Office of School Administration to prepare and maintain the District's five-year enrollment projections. Manages the development of the district's five-year financial forecast, annual cost to continue analysis and contributes in the development and implementation of the District's Strategic Plan.
- Advises and makes recommendations to the CFO concerning budget reporting and management matters and proposes procedural changes in budget processes to enhance operating efficiencies. Recommends changes to internal and management controls as necessary.
- Responds to staff, management and audit inquiries related to assigned responsibilities. Addresses external auditor management letter comments by reviewing and revising procedures and systems as recommended.
- Serves as the point person for principals and department heads in monitoring budgets and forecasting year-end positions. Recommends methods for solving budget variances. Identifies year-end surpluses and deficits at the school and district levels.
- Researches and evaluates new statutory and contractual developments related to District budgetary issues. Conducts fiscal studies relative to projections of short and long-term budget requirements and the impact on the local tax structure and other funding sources. Recommends changes and implementation procedures to the CFO.
- Responds to inquiries by researchers, regulators, the public, staff members and other stakeholders. Maintains positive relationships internal and external to the District.
- Provides critical costing information under time-sensitive and often politically sensitive circumstances.
- Manages and monitors the work performance to include evaluating program/work objectives and effectiveness, establishing broad organizational goals and re-aligning work and staffing assignments for the department. Approves the hiring, disciplinary and evaluation decisions made by subordinate staff.
- Ensures valid processing of Request to Fill (RTF) forms from all departments and District sites to ensure position authority and funding availability.
- Supports Board of School Directors and district administration in formulating policies and developing appropriate procedures. Stays current on and keeps district abreast of changes in state and federal regulations which impact financial activities.
- Actively supports the MPS Strategic Plan.
- Performs other duties as assigned.

Job Requirements:

Education Requirements:

- Position requires a bachelor's in finance, accounting, business, public administration OR a related field.
- Advanced certification (CPA) or a master's degree is desired.
- Driver's License (must have personal transportation available).

Experience Requirements:

- Position requires seven or more years of progressive supervisory experience with in a financial or accounting environment.
- Experience in budget and strategic planning in a K-12 district or similar environment which is subject to federal, state and local government regulations is required.
- Previous public sector experience is helpful.

Knowledge, Skills and Abilities:

- Effective oral and written communication and presentation skills are required.
- Skill at organizing resources and establishing priorities.
- Experience supervising staff and managing budgets is required.
- Excellent teamwork skills are essential.
- The ability to develop effective working relationships with diverse individuals at all levels is required.
- The ability to analyze data and communicate results to stakeholders is required.
- Must be able to anticipate and respond to the needs of stakeholders and manage their expectations within District parameters.
- Develops strategies and positively influences others to achieve the best overall results is necessary.
- Must have excellent planning and organizational skills and be able to set priorities and monitor progress on stated goals and objectives.
- A strong working knowledge of computer applications to include MS Office software and financial databases and software is required.
- Must be able to juggle numerous responsibilities with varying deadlines.
- The ability to gather data, compile information and prepare reports is required.

Working Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

- Typical office or school environment
- Position may be required to work additional hours, outside of the normal business day as a regular part of the job
- Frequently required to travel around the city of Milwaukee and occasionally travel out of town

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job with or without reasonable accommodation.

Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008.

Equal Opportunity:

It is the policy of the District that persons seeking employment with the District shall not be discriminated against in employment by reason of their age, race, creed, color, religion, handicap or disability, pregnancy, marital or parental status, sex, citizenship, national origin, ancestry, sexual orientation, arrest record, conviction record, military service, membership in the National Guard, state defense or reserves, political affiliation, use or nonuse of lawful products off the employer's premises during nonworking hours, declining to attend a meeting or to participate in any communication about religious matters or political matters, the authorized use of family or medical leave or worker's compensation benefits, genetic information, physical, mental, emotional or learning disability, or any other factor protected by local, state or federal law in all employment practices including terms, conditions and privileges of employment.

Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008.

Reasonable accommodations shall be made for qualified individuals with a disability, unless such accommodations would impose an undue hardship on the District. Requests for accommodations under the Americans with Disabilities Act or under the Wisconsin Fair Employment Act must be submitted to the Employee Rights Administration Department in the Office of Human Resources.