



**POSITION DESCRIPTION**

<b>JOB TITLE: Senior Director, Financial Planning and Budget Services</b> Job Class: 1145	
<b>DATE</b>	Office of Finance Financial Planning and Budget
<b>Cabinet Level</b>	<b>FLSA STATUS:</b> <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non exempt
<b>Pay Schedule:</b> <b>Pay Range:</b> \$	<b>Management Approval:</b>
<b>POSITION SUMMARY and PURPOSE:</b> Plans, organizes and coordinates the development, preparation, presentation, implementation and evaluation of the district's annual \$1.1 billion budget and long-range financial planning. Serves as the second in command in the Office of Finance and represents the Chief Financial Officer (CFO) as requested. 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 and the Office.	

**ESSENTIAL FUNCTIONS:** Indicate the approximate percentage of time devoted to each major task or group of related tasks. Summarize position in no more than 15 tasks, each of which requires at least 5% of incumbent's time.

**NOTE:** An essential function must meet the following criteria:

- 1) The reason the position exists is to perform that function,
- 2) No other employee is available to perform that function,
- 3) The function is highly specialized, and
- 4) Removing the function would fundamentally alter the job.

1. Provides direction, coordination and supervision over staff, activities and work product. Maintains a climate which attracts and motivates a diverse staff of quality individuals.
2. Devises solutions for crisis situations as they arise. Analyzes data utilizing a variety of complex processes. Makes recommendations for solutions.
3. Prepares and maintains 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.
4. Creates opportunities to increase the District's revenues and implements cost-savings methods. Advises and makes recommendations to senior staff 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.
5. 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, the superintendent and other senior staff members.
6. Monitors the District's staffing and position control process. Ensures an effective management team, with appropriate provisions for succession are in place.

7. Represents the CFO as needed and serves as the second-in-command for the Office of Finance. Serves as a member on the District's employment relations negotiations teams.
8. Responds to inquiries by researchers, regulators, the public, staff members and other stakeholders. Maintains positive relationships internal and external to the District.
9. Develops financial and compliance acumen within the organization.
10. Provides critical costing information under time-sensitive and often politically sensitive circumstances.
11. Manages and monitors the work performance of the Office 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.
12. Approves receipt of District donations.
13. Ensures valid processing of Request to Fill (RTF) forms from all departments and District sites to ensure position authority and funding availability.
14. 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.
15. Actively supports the MPS Strategic Plan.
16. Performs other duties as assigned.

**SUPERVISION RECEIVED:** (Indicate the extent to which work assignments and methods are outlined, reviewed, and approved by others.)

Limited direction provided by the Chief Financial Officer.

**SUPERVISION EXERCISED:** (List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following: (a) assign duties; (b) outline methods; (c) direct work in process; (d) review completed work; (e) sign or approve work; (f) make hiring recommendations; (g) prepare performance appraisal; (h) take or recommend disciplinary action.

Total supervision for 17 staff members; 4 direct reports and 13 indirect.

**JOB REQUIREMENTS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and ability required. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

**Education Requirements** (Include certificates, licenses, and/or registrations required.)

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.

**Experience Requirements**

Position requires five to seven years of progressive supervisory experience with in a financial or accounting environment. 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, Hyperion, ESIS and the MPS Portal 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.

General office environment.

*Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990.*

**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.

General office environment, must be able to handle light lifting and occasional standing, bending. The position requires long hours and the ability to attend evening and some weekend meetings.

**THIS DESCRIPTION DOCUMENTS THE GENERAL NATURE AND LEVEL OF RESPONSIBILITY ASSOCIATED WITH THIS POSITION. IT IS NOT INTENDED TO BE A COMPREHENSIVE LIST OF ALL ACTIVITIES, DUTIES AND RESPONSIBILITIES REQUIRED OF INCUMBENTS. IT IS NOT INTENDED TO LIMIT OR MODIFY THE RIGHT OF ANY SUPERVISOR TO ASSIGN, DIRECT, AND MONITOR THE WORK OF EMPLOYEES UNDER SUPERVISION.**