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<b>Position:</b>	Assistant Director	<b>FLSA:</b>	Exempt
<b>Department/Site:</b>	Budget and Finance	<b>Salary Grade:</b>	128
<b>Reports to/Evaluated by:</b>	Director of Budget and Finance	<b>Salary Schedule:</b>	Classified Management

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**SUMMARY**

Under general direction plans, organizes and supervises the duties of the Budget and Finance Department to ensure accurate and timely financial reports including quarterly SACS reporting. Performs highly complex fiscal related work according to generally accepted accounting principles, established administrative procedures, departmental guidelines, and regulatory requirements applicable to the position. Position exercises independent and highly technical thought and analysis in financial management to produce reports and recommendations.

**DISTINGUISHING CAREER FEATURES**

This is a management level position within the Business Services division, managing all levels of Financial Analysts. The position performs work which is complex and technical in nature. Work is performed independently, guided by California Education Code, Board Policy, Standardized Account Code Structure (SACS) and standard operating procedures. Advancement to this position could be lateral or through the budget and finance ladder. Advancement would require additional education and experience. Prospective incumbents must have considerable supervisory experience or management training. Advancement from Budget and Finance Assistant Director is possible with the proper level and variety of leadership experience, knowledge and formal education.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Assists the Director of Budget and Finance in the preparation and administration of all financial reports, including but not limited to the annual budget, quarterly financial reports and the year-end financial report.
- Supervise, provide clear work direction and evaluate the performance of assigned personnel; provide clear, constructive feedback to improve staff effectiveness; recommend performance improvement plan, disciplinary and other personnel-related actions; train personnel in assigned areas.
- Direct, control and monitor appropriate workflow, computer system procedures, staff development, priorities and work assignments to provide timely delivery of high-quality services to staff, sites and departments.
- Interprets and explains fiscal policies and guidelines to employees, sites and departments. Assists staff in the understanding and application of fiscal responsibilities, policies and procedures.

- Collaborate with leaders and staff from other departments on issues and problems related to assigned area; evaluate and enhance programs to align to District standards.
- Initiate, complete, evaluate and validate a variety of state, local and federal reports and financial statements in a timely manner to ensure accuracy and completeness; coordinate the collection of data through computer-generated reports; compose correspondence and maintain records.
- Assist the Director related to addressing audit exceptions, regulations, and reporting requirement changes and creates accounting practices and procedures to adhere to changes needed.
- Identify, and participate in maintaining, sound internal accounting controls. Applies preestablished accounting controls to balance sheets, fund accounts and special accounts according to generally accepted accounting principles.
- Maintains current knowledge of the State's Standardized Account Code Structure (SACS), ensuring the District Chart of Accounts is up to date and compliant.
- Complete quarterly SACS reports. Files Federal, State and local budget reports as required. Prepares various ad hoc and regular recurring reports for external agencies including those mandated.
- Analyze and evaluate automated financial systems, computer-generated financial reports and other automated programs. Be the Munis Functional Lead representing the Budget and Finance department. Lead department through system upgrades and process improvement.
- Performs other duties as assigned that support the goals of the department and the Strategic Plan of the District.

## **QUALIFICATIONS**

**Knowledge and Skills:** Considerable knowledge of the principles and procedures of accounting, auditing and finance with additional expertise in budget preparation, administration and position control. Comprehensive understanding of District operations, policies, procedures and goals is essential. Thorough knowledge of District financial processes and programs is essential. In-depth knowledge of Federal, State and local laws and regulations applying to District budget and financial operations is essential. Requires sufficient human relations skills to convey personal and technical information to all levels of staff.

**Abilities:** Requires the ability to perform all aspects of the position. Must be able to prepare clear, complete and concise financial records. Advanced Excel skills, including ability to work with formulas, perform v-lookups, modify and create pivot and data tables. Requires the ability to think outside the box, analyze situations, develop and adopt effective solutions. It is imperative that the incumbent be able to organize and prioritize work in order to meet rigid schedules and financial timelines. Must be able to manage and lead staff in a manner which encourages high morale and efficiency.

**Physical Abilities:** Requires sufficient hand coordination to use a keyboard for routine typing and data entry, plus arm/hand movements to retrieve work materials and operate a variety of general office equipment.

**Education and Experience:** Bachelor's degree in accounting or related field required supplemented by four (4) to five (5) years of relevant experience in accounting, budgeting, public financial management or closely related field required. Experience in a school business or accounting office is preferred. Additional

work experience may be substituted for higher education. Minimum of two (2) years supervisory experience.

**Licenses and Certificates:** May require a valid driver's license.

**Working Conditions:** Work is performed indoors where minimal safety considerations exist.