

Board Office Use: Legislative File Info.	
File ID Number	20-0760
Introduction Date	4/22/2020
Enactment Number	
Enactment Date	



Memo

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Tara Gard, Deputy Chief Talent Officer

Board Meeting Date April 22, 2020

Subject Approval of New Employment Agreement with Lisa Grant-Dawson

Action Approval by the Board of Education of an Employment Agreement with Lisa Grant-Dawson to serve as Chief Business Officer for the term April 27, 2020 to June 30, 2022, at an annualized base salary of \$247,200.00 per year plus estimated fringe benefits with an annualized costs of \$36,154.32 starting in 2019-20.

Background The Employment Agreement provides that the Chief Business Officer (CBO) will provide leadership in planning, supervising and directing the business and operations of the District and will function in an advisory role to the other support programs of the District. The CBO's work includes the formulation of District policies and plans regarding non-instructional operations and resources, monetary policy, and the review of all financial aspects of the District to ensure fiscal solvency. In addition, the CBO is responsible for long-range strategic financial and operational planning and budget development. The CBO oversees the following services and divisions: Nutrition Services, Transportation, Facilities, Information Technology, all Financial Services departments, and other operational divisions of OUSD as assigned. The CBO serves as the principal advisor to the Board of Education and the Superintendent in matters related to non-instructional areas of the District.

Discussion Ms. Grant-Dawson has had a long, stable, and distinguished career in school district finance. Most recently, she served as the CBO at Stockton USD and has been in that role for almost five years. Including Stockton, Ms. Grant-Dawson served as CBO for three of the most challenged school districts in California, providing opportunities for her to help those districts improve their fiscal health, develop strategies to move

stalled initiatives and projects forward, improve relationships with labor, update and revise policies to operationalize best practices, and develop progressive partnerships with inter-agency groups, business leaders, and community organizations.

The proposed new contract would be for a little more than two years and two months. State law requires the Board to report a summary of the salaries or compensation paid in the form of fringe benefits of a local agency executive. Ms. Grant-Dawson would receive fringe benefits for 2020-21 of health, vision, and dental insurance as well as long term disability insurance); expense reimbursement to attend appropriate professional and official meetings, and any stipends (e.g., education, travel and cell phone) for which Employee is eligible.

Fiscal Impact

Annualized base salary of \$247,200 per year plus fringe benefits of \$36,154.32 starting in 2019-20.

Attachment

Proposed Employment Agreement with Lisa Grant-Dawson



TALENT DIVISION

EMPLOYMENT AGREEMENT

Lisa Grant-Dawson, Chief Business Officer

In consideration of the mutual promises made herein, the Oakland Unified School District, ("OUSD") a local public entity pursuant to Government Code section 811.2 and by the California Education and Government Codes, and Lisa Grant-Dawson, an individual (hereinafter "Employee"), enter into this Employment Agreement ("Agreement") and agree as follows:

Article 1 Acceptance of Employment and Term

- 1.1 District hereby employs Employee and Employee hereby accepts employment with the District on the terms and conditions stated herein. In approving and adopting this Agreement, the Governing Board hereby resolves and designates the position of Chief Business Officer as senior management of the classified service pursuant to Education Code section 45100.5. In entering into this Agreement, Employee hereby acknowledges and agrees that as Chief Business Officer, Employee is a member of the senior management of the classified service and that no other employment classification is applicable to Employee's employment with the District.
- 1.2 The term of this employment agreement is April 27, 2020, through June 30, 2022 ("Term"), unless extended in writing by mutual agreement of District and Employee at least six (6) months prior to the end of the agreement or terminated sooner at the discretion of District or Employee as referenced in Article 7 of this agreement.
- 1.3 Employee's work year shall be 261 days which shall be reduced by 20 days of vacation and 14 paid holidays for a total of 227 work days.

Article 2 Duties and Obligations of Employee

- 2.1 Employee shall serve as the Chief Business Officer for the District. Employee is supervised by and responsible to the Superintendent. Employee shall perform the duties set forth and prioritized by the Superintendent included in the "Chief Business Officer Priorities Reference" and the job description attached as Exhibit A and incorporated by reference herein.
- 2.2 Employee shall adhere to and comply with all laws, statutes, regulations, policies and administrative bulletins that presently or prospectively govern District and the conduct of its employees.



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- 2.3 As part of the consideration for the compensation set forth in Article 4 of this Agreement, District and Employee agree that any intellectual property created by Employee related to or concerning the financial work of the District is owned jointly between the District and Employee. Employee shall grant to District the right to share equally in any royalties received by Employee arising out of any intellectual property created by Employee related to or concerning the lawful work of the District.
- 2.4 As part of the consideration for the compensation set forth in Article 4 of this Agreement, the District may use Employee's name likeness during the term of employment as necessary or convenient without additional compensation to the Employee.
- 2.5 Employee warrants and represents that Employee has the ability and authority to enter into this Agreement, that there are no restrictions or limitations on entering into this Agreement, and that entering into this Agreement will not violate any agreement(s) Employee has with any third parties.
- 2.6 Employee agrees to devote her full time to the performance of her duties; however, Employee may undertake free consultative work, speaking engagements, and lectures upon written agreement with the Superintendent and the use of eligible leave.

Article 3 Obligations of District

- 3.1 District agrees to defend, indemnify and hold Employee harmless against any claims, demands, actions, lawsuits, losses or damages of any kind or nature arising out of or related to the course and scope of Employee's discharge of Employee's duties as Chief Business Official. District may continuously maintain throughout the term of employment adequate insurance for such purpose.
- 3.2 District shall provide Employee with the office, equipment, material and resources reasonably required by Employee to fulfill the duties, responsibilities and obligations of the Chief Business Officer.

Article 4 Compensation

The salary of Employee shall be fixed at \$247,200 per year, payable on the same schedule as other non-represented senior management employees, or at such other times as the District may provide for the payment of employee salaries. Employee shall be entitled to salary increases provided to all unrepresented management staff and to any stipends for which Employee is eligible.



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- 4.1 District shall have the right and obligation to deduct or withhold from compensation due Employee those sums required for applicable federal, state and local income taxes and Social Security taxes.
- 4.2 District shall fund its (the employer's) portion of CalPERS retirement based upon the salary herein.

Article 5 Vacation, Sick and Personal Leave

- 5.1 Employee shall be entitled to twenty (20) annual vacation days with pay. Employee is encouraged to take all vacation days during the year in which such days are earned. At the District's option, Employee may be reimbursed annually at Employee's daily rate of pay for any unused days, not to exceed twenty (20) days per year. Employee shall not accrue more than twenty (20) vacation days annually. Any cap or limit on total accrued vacation days applicable to other unrepresented management staff shall apply to Employee.
- 5.2 Employee shall be entitled to accrue paid sick leave at the rate of 1.0 days per month, up to a maximum of 12 days per year. If Employee does not utilize the total amount of accrued sick leave authorized during any year, Employee may carry over the unused sick leave to sick leave in the subsequent year.
- 5.3 Employee is entitled to accrue annual paid personal leave at the rate of five (5) days per year. If Employee does not utilize the total amount of accrued personal leave authorized during any year, such leave may be carried over to unused sick leave in the subsequent year.

Article 6 Employee Health Benefits and Expense Reimbursement

- 6.1 District agrees to pay directly to Employee's existing or future health, dental and vision providers, the insurance premiums associated with Employee, and Employee's qualified dependents under Internal Revenue Code section 152. The cost of any increase in insurance premiums in 2020-21 and 2021-22 as compared with 2019-20 shall be borne by Employee. The Employee's responsibility for the cost of any increase in insurance premiums shall not necessarily continue as part of any future employment contract between District and Employee. District further agrees to maintain during the term of employment long-term disability insurance for Employee.
- 6.2 District shall pay the reasonable expenses of Employee, or shall reimburse Employee, pursuant to the policies and practices of District, to attend appropriate professional and official meetings at the local, state and national level, subject to constraints of the budget of the Office of the Chief Business Officer.



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Article 7 Termination of Employment

7.1 District and Employee agree Employee shall serve at the pleasure and will of the Superintendent.

7.2 This employment contract may be terminated by:

Termination Without Cause. Either party may terminate this agreement for no reason upon thirty (30) days written notice given as provided below. In the event the Agreement is terminated by the District for without cause under this paragraph, the District shall pay the Employee a severance amount equal to the monthly salary of Employee multiplied by the number of months left of the unexpired term of the Agreement. However, if the unexpired term of the Agreement is greater than three (3) months, the maximum severance amount shall be an amount equal to the monthly salary of the employee multiplied by three (3). Subject to Government Code section 53260, regardless of the term of the contract, if the contract is terminated, the maximum cash settlement that the Employee may receive shall be an amount equal to the monthly salary of the employee multiplied by the number of months left on the unexpired term of the contract, not to exceed three (3) months. In consideration for said payment, if the severance is accepted by the Employee, the Employee shall have waived all past and present claims against the District, District employees and District Board Members that arise in whole or in part during the Employee's employment or severance from employment, including a waiver of all rights and protections under California Civil Code section 1542. Employee as a condition of said payment shall sign an acknowledgement via a Waiver and Release that Employee has agreed to receive the severance amount in exchange for the aforementioned waivers and release of claims. Any payment made under this section shall be made no later than thirty (30) days after the day Employee executes the aforementioned acknowledgement. .

I expressly waive the provisions of Section 1542 of the Civil Code of the State of California, and I understand that said Section provides:

"A general release does not extend to claims which the creditor does not know or suspect to exist in his or her favor at the time of executing the release, which if known by him or her must have materially affected his or her settlement with the debtor."

I agree not to institute or cause to be instituted any action in state or federal court, or before any local, state, or federal governmental entity, relating to or arising out of my employment with the District or separation from District employment, including claims based on the Age Discrimination in Employment Act of 1967.



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I agree not to institute or cause to be instituted any action in state or federal court, or before any local, state, or federal governmental entity, that arises out of or reasonably relates in any manner to my employment with the District or separation of employment with the District including, without limitation, contract or tort claims, claims based on the Fair Employment and Housing Act, Government Code § 12940 et seq., California Labor Code § 132a, 42 U.S.C. § 2000(e) et seq., 29 U.S.C. § 621 et seq., the California Civil Code, the California Government Code, 42 USC Section 1983, Title IX, the Unruh Act, Title VII of the Civil Rights Act of 1964, and the Americans with Disabilities Act of 1990, 42 U.S.C. § 12101 et seq., the Employee Retirement Income Security Act, 29 U.S.C. § 1001 et seq. (except as excluded by law), the Fair Labor Standards Act of 1938, 29 U.S.C. § 201 et seq., the Rehabilitation Act of 1973, 29 U.S.C. § 701 et seq., the False Claims Act, 31 U.S.C. § 3729 et seq., the Family and Medical Leave Act, 29 U.S.C. § 2601 et seq., COBRA, the California Family Rights Act, the Educational Employment Relations Act of 1976, Cal. Govt Code § 3540 et. seq., the Genetic Information Act.

I understand the following information, which is required by the Older Workers Benefit Protection Act ("OWBPA"), if legally applicable to me:

I have been advised to consult an attorney regarding this Waiver and Release of Claims ("Waiver and Release") and the terms contained in this Waiver and Release before deciding whether or not to sign it;

I have 21 days from the date this Waiver and Release is presented to me to consider this Waiver and Release and to decide whether to sign it, although I may, in the exercise of my own discretion, sign or reject it at any time before the 21-day period expires, thus waiving the remainder of the 21-day consideration period;

At any time within 7 days after signing this Waiver and Release, I may revoke the waiver and release of Age Discrimination in Employment Act ("ADEA") claims.

The waiver and release of ADEA claims is not effective or enforceable until the 7-day revocation period has passed. If during the 7-day revocation period I choose to revoke the waiver and release of claims under this Section 4 of this release, the revocation must be in writing and delivered prior to the expiration of the 7-day period to: Oakland Unified School District, Office of the General Counsel, 1000 Broadway, Suite 300, Oakland, CA 94607.

I understand that a revocation of the waiver and release of ADEA claims, if legally applicable to me, will release the District from any obligation to provide me with the severance consideration described herein.



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This acknowledgement of waiver and release may be signed in counterparts, each of which shall be deemed to be an original, and all of which taken together shall constitute one and the same agreement. Faxed, electronic and/or email signatures shall be acceptable signatures for purposes of binding the parties to the terms of the Waiver and Release.

I understand the contents of this release and sign the same voluntarily and without duress.

- a. Retirement of Employee.
- b. Death or Disability of Employee. For purposes of this Agreement, “disability” means Employee’s inability, by reason of physical or mental infirmity or both, to perform the duties contemplated under this Agreement with or without reasonable accommodation for a period of 120 consecutive days or 150 workdays in the aggregate in a consecutive twelve (12) month period. “Disability” shall be determined by a licensed physician acceptable to the District and Employee. The physician’s fee shall be paid by the District. Any termination for disability shall not prejudice any rights under any disability policies benefiting Employee.
- c. Discharge for Cause. For purposes of this Agreement, “cause” shall mean Employee’s (a) conviction (or a *nolo contendere* plea) to any felony or misdemeanor; (b) dishonesty in performing Employees’ duties under this Agreement; (c) repeated and willful misconduct under this Agreement; or (d) willful neglect of Employee’s duties under this Agreement.

Prior to final determination by the Superintendent of cause for termination, Employee must have been given thirty (30) calendar days written notice of such possible action, and of the grounds therefore, and a reasonable opportunity to be heard by the Superintendent in the way of explanation or defense.

In the event that such termination is determined by the Superintendent (or later adjudicated) to be “without cause,” the sole remedy shall be to make Employee whole in salary and benefits pursuant to 7.2.a above.

- 7.3 Pursuant to Education Code section 35031, Employee shall be provided written notice at least forty five (45) days in advance of the expiration of Employee’s term if Employee is not to be reemployed.

Employee initials acknowledging termination clauses: SGD



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Article 8 General Provisions

- 8.1 The Superintendent shall evaluate Employee not less than annually upon a schedule to be determined. The evaluation and assessment shall be reasonably related to the position description and to the specific goals identified in Exhibit A titled "Two-Year Vision", goals and objectives of the District for the years in question.
- 8.2 The Superintendent, in consultation with Employee, shall determine the performance metrics and progress timelines.
- 8.3 In the event that the Superintendent determines that the performance of the Employee is unsatisfactory in any respect, the District shall describe in writing and in reasonable detail specific instances of unsatisfactory performance. The evaluation shall include recommendations as to areas of improvement in all instances where the Superintendent deems performance to be unsatisfactory. A copy of the written evaluation shall be delivered to the Employee. Employee shall have the right to make a written response to the evaluation, to be placed in the personnel file along with the evaluation.

Article 9 General Provisions

- 9.1 All notices required to be given under this Agreement shall be delivered via hand delivery, by first class mail or via email as follows:

To the District: Kyla Johnson-Trammell, Superintendent
1000 Broadway, Suite 300 Oakland, CA 94607

To the Employee: Lisa Grant-Dawson, Chief Business Officer
1000 Broadway, Suite 400 Oakland, CA 94607

The Superintendent or Employee may change the designated address for the giving of notices by providing to the other amended notice information in writing.

- 9.2 Additional written amendments may be added to the Agreement by mutual consent of the Employee and the Superintendent at any time during the period of this Agreement.
- 9.3 Any controversy between the District and Employee involving the construction or application of any of the terms, provisions, or conditions of this Agreement shall, on the written request of either party served on the other, be submitted to binding arbitration. Arbitration shall comply with and be governed by the provisions of the California Arbitration Act. District and Employee shall agree on the selection of one person to hear and determine the dispute. If the parties are unable to agree on a single arbitrator to hear



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the dispute, they shall obtain a list of arbitrators from the American Arbitration Association and select the arbitrator by alternative strike method. The arbitration shall be governed by the California Arbitration Act, Code of Civil Procedure § 1280 *et seq.*

- 9.4 "Year" as used in this Agreement means a fiscal year, July 1 through and including June 30th. "Day" or "days" as used in this Agreement means calendar days unless stated otherwise.
- 9.5 No waiver of any rights or obligations under this Agreement may occur unless provided in writing.
- 9.6 This Agreement constitutes the entire agreement between District and Employee concerning the subject matter of this Agreement. Any prior agreements or understandings between District and Employee concerning the same subject matter not contained within this Agreement are null and void.
- 9.7 This Agreement is subject to all applicable laws of the State of California, to the rules and regulations of the State Board of Education, and to the lawful rules and regulations of the Board.
- 9.8 If during the term of this Agreement it is found that a specific clause of the Agreement is illegal under Federal or State law, the remainder of the Agreement not affected by such a ruling shall remain in force.
- 9.9 This Agreement may be modified or extended only in writing and must be signed by District and Employee.
- 9.10 This Agreement shall be effective upon execution by Employee and the President and Secretary of the Board of Education. This Agreement may be executed and delivered by facsimile or other electronic signature (including portable document format) by either of the parties and, notwithstanding any statute or regulations to the contrary (including, but not limited to, Government Code section 16.5 and the regulations promulgated therefrom), the Agreement shall legally bind the signing party and the receiving party may rely on the receipt of such document so executed and delivered electronically or by facsimile as if the original had been received. This section constitutes a waiver by each party of the requirements and constraints on electronic signatures found in statute and regulations including, but not limited to, Government Code section 16.5 and the regulations promulgated therefrom.

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TALENT DIVISION

By Employee:

Lisa Grant-Dawson

By District:

Jody London
President, Board of Education

Kyla Johnson-Trammell
Superintendent

Previously approved as to form by General Counsel



TALENT DIVISION

EXHIBIT A

CHIEF BUSINESS OFFICER PRIORITIES:

Two-Year Vision: Consistent with the below position description, the Chief Business Officer (“CBO”) will be charged with reimagining the District’s financial department to help the District achieve financial goals as outlined by the Fiscal Vitality Plan. By 2022, the CBO will:

- Create a high-functioning financial department
- Strengthen/rebuild financial systems and processes within Facilities, Nutrition Services, Special Education and Early Childhood
- Develop a two-year professional development plan to build capacity among Financial Staff
- Review, revise or develop clear standard operating procedures for the floor based on guidance from the county, FCMAT, and audit findings
- Hire remaining positions that are vacant on in the Financial Services Division to meet the needs of the team
- Partner with the Chief Systems and Services Officer (CSSO) to develop a robust communication and engagement process to support the design and approval of the annual budget.

The CBO must embody OUSD values, thrive under pressure, and embody collaborative leadership. The CBO will also have strong leadership skills that would allow for the coaching of key team members on key practices as the new team begins to address key improvement areas. By January 2022, the Superintendent and CBO will evaluate progress made and determine the long-term organizational structure for the Finance and Operation Divisions.

The CBO’s initial focus and direct supervision will be on the following departments:

- Budget/Accounting
- Accounts Payable
- Payroll
- Risk Management
- Strategic Resource & Planning
- Additional departments, as assigned by the Superintendent

The CBO will coordinate and manage financial check-ins (in collaboration with departmental leaders) with the following departments:

- Facilities
- Special Education
- Nutrition Services



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- Early Childhood
- Additional departments, as assigned by the Superintendent

The CBO will manage development of financial reports and presence and/or assignment of financial staff to ongoing stakeholder committee meetings:

- Board Meetings
- Budget and Finance
- District Budget Advisory Committee
- Health Governance Board
- Parent Student Advisory Committee
- Principal Advisory Committee
- Measure G, G1 and N Commission Meeting

Nothing within these priorities shall prohibit the Superintendent, in consultation with CBO, from establishing additional and new priorities.



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Chief Business Officer (CBO) - Office of the Superintendent Position Description

BASIC FUNCTION

The Chief Business Officer (CBO) provides leadership in planning, supervising and directing the business and operations of the District. Functions in an advisory role to the other support programs of the District. The CBO's work includes the formulation of District policies and plans regarding non-instructional operations and resources, monetary policy and the review of all financial aspects of the District to ensure fiscal solvency. In addition, the CBO is responsible for long-range strategic financial and operational planning and budget development. The CBO oversees the following services and divisions: Nutrition Services, Transportation, Facilities, Information Technology, all Financial Services departments and other operational divisions of OUSD as assigned. Serves as the principal advisor to the Board of Education and the Superintendent in matters related to non-instructional areas of the District.

REPRESENTATIVE DUTIES

{Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to reflect the principal job elements accurately.}

Essential Functions:

- Lead and provide sound leadership and direction to fiscal and business services
- Collaborate with the Superintendent, Leadership Team and Board to formulate the District's approach to strategic financial management and business development and execution
- Provide broad financial leadership through advice and counsel, and lead the development and implementation of an integrated strategic financial plan that allows for the successful management of the District
- Support strategic management of the District assisting management in addressing key financial issues
- Manage systems that track financial performance providing forecasts and insightful analyses of financial results
- Facilitate the annual and long-range business planning function, including the selection of measurement tools to assess and evaluate the District's financial and business performance; coordinate and maintain support for integrated annual and long-range business and financial planning
- Analyze the District's short- and long-term financial position and make recommendations to the Superintendent, Leadership Team and Board regarding ongoing organization, integration and effectiveness of various business functions and



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- overall capital structure
- Develop and implement short- and long-term plans and activities to meet both educational and financial goals of the District, including prioritization of resources; analyze the District's financial position, and develop recommendations for immediate and long-range financial management
- Provide strategies and recommendations for ensuring the District's fiscal solvency; ensure integrity of the District's financial reports and solvency in accordance with state and federal law
- Provide leadership to ensure a robust prioritization process to ensure adequate funding for District priorities while also maintaining funds for unanticipated operating costs and capital expenditures; ensure appropriate utilization of resources and adherence to budgets
- Maintain the development and maintenance of a District financial support function that is viewed as transparent, responsive and service-oriented
- Oversee the development and ongoing monitoring of the District's annual operating budget and multiyear financial planning; provide financial information to the Superintendent, Board of Education and other divisions to facilitate decision making
- Provide technical expertise, information, and assistance regarding assigned financial and business operations; formulate and develop policies, procedures, and programs to ensure effective management controls
- Provide technical expertise, information and assistance to the Superintendent regarding District budgets and financial and accounting activities; advise the Superintendent of unusual trends or problems and recommend appropriate corrective action
- Provide advice and counsel to the Superintendent, Board of Education, and District staff on matters pertaining to assigned areas of responsibility; prepare reports and recommendations for the Superintendent and the Board of Education, including comprehensive financial data covering all aspects of school finance; advise the Superintendent of business and financial trends or problems, and recommend appropriate corrective action
- Conduct financial analysis, and provide financial data as required for District negotiations; participate in the negotiation process with employee groups when needed; prepare and certify the District's public disclosure, as required by law, on all collective bargaining agreements before they are approved by the Board of Education
- Attend meetings of the Board of Education; present and interpret financial impact of proposals as necessary
- Communicate and collaborate with other District administrators, District personnel, outside organizations, public entities, contractors, the community, and various local, state, and federal agencies to coordinate activities and programs, resolve issues and conflicts, and exchange information; propose, as needed, and monitor District standards of business and financial ethics and professionalism



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- Remain current on all laws, rules, regulations, and interpretations of law regarding school finance, fiscal reporting requirements, mandated changes, and District entitlement to federal, state, and local monies; participate in the development of legislation affecting school finance and business management; modify programs, functions, policies, regulations, and procedures to assure compliance with local, state, and federal requirements as appropriate
- Attend and conduct a variety of meetings as assigned; establish and maintain relations/memberships with local, state, and federal agencies and associations to remain current on programs and issues that affect business and financial duties
- Supervise, evaluate, and hold accountable the performance and professionalism of assigned staff; interview and select employees, and recommend transfers, reassignments, terminations, and disciplinary actions; plan, coordinate, and arrange for appropriate training of assigned staff
- Serve as a member of the Superintendent's Cabinet; attend or participate in required District, Board of Education, and committee meetings, and other activities deemed necessary by the Superintendent
- Perform related duties as assigned

MINIMUM QUALIFICATIONS

Training, education, and experience:

- A Master's degree in Business Administration, Public Administration, Finance, Accounting or related field
- Seven (7) years of comprehensive and progressive related experience in fiscal and business management in a large school district or county office of education and three (3) years of senior management responsibility

Licenses and other requirements:

- Valid California Driver's License
- Employment eligibility that may include fingerprints, Tuberculosis and/or other employment clearance

KNOWLEDGE AND ABILITIES

Knowledge of:

- Planning, organization, control, direction, and administration of the financial and business operations of the District
- Federally accepted categorical and general fund guidelines and requirements
- Generally accepted accounting and auditing principles, practices, and procedures



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- State and federal regulations for financial management of a public school district
- State, federal and local laws, regulations and court decisions applicable to school business operations and financial management
- Principles and practices of public administration, intergovernmental relations, school business operations and financial management
- Principles, practices, tools and techniques of statistical analysis and project management
- Principles and practices of negotiations and collective bargaining
- Techniques and principles of high-quality customer service, customer relationship management and internal consulting concepts and practices
- Principles and practices of effective leadership, management and supervision
- Principles and techniques of leadership, organization, supervision, budgeting, personnel administration and management
- Principles, practices and trends relating to the full scope of school business management and California educational programs pertaining to school districts and county offices of education
- Laws, rules, regulations relating to school districts
- Principles, practices, and techniques of program and policy development, implementation, monitoring and control; operating programs and guidelines of California's FCMAT (Fiscal Crises and Management Team) or comparable system operating in another state, and AB1200 and AB2756 responsibilities for school districts
- Diverse academic, socio-economic, cultural, ethnic, and disability backgrounds of District students and staff • Supervisory, organization and management principles and practices
- Correct English usage, grammar, spelling, and punctuation
- Computer software, hardware, and related technology

Ability to:

- Develop strategic goals and translate into tactical operations in a manner which is understandable to all employees
- Plan, organize, control, direct, and administer the financial and business operations of the District
- Provide internal consultation services for business and financial services to the Superintendent of Schools, Board of Education, and District departments
- Analyze District financial requirements, implement effective systems and controls, and make recommendations
- Plan, direct and integrate a broad range of complex business and financial planning, budgeting and service programs and activities
- Oversee preparation and monitoring of District budgets
- Analyze processes and problems, identify opportunities for improvement and follow through on changes, in a timely and consistent manner



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- Develop, modify, and direct the implementation of budgetary control and accounting systems
- Critically evaluate financial performance
- Provide creative and effective solutions for meeting the financial needs of the District
- Review existing and pending legislation related to procedural guidelines and District budget program
- Understand, interpret, apply and explain complex state and federal policy, law, regulation and court decisions applicable to school business and financial operations
- Establish and maintain cooperative and effective working relationships with others
- Demonstrate effective written communication skills, including content communication, conciseness, grammar and usage
- Present views in a clear and compelling manner and develop trust and influence as a senior thought leader with a broad relationship base
- Analyze situations accurately, and adopt an effective course of action
- Work independently with little direction
- Plan and organize work to meet schedules and timelines
- Prepare and present clear and concise comprehensive narrative, reports and correspondence to a variety of audiences
- Represent the District in a variety of public settings
- Provide leadership by building, directing and motivating a diverse workforce at all levels in the organization
- Supervise and evaluate the performance of assigned staff
- Operate personal computer, related software, and other office equipment

WORKING CONDITIONS

Environment: Office and diverse school site environments; driving a vehicle to conduct work; fast-paced work; constant interruptions
Physical demands: Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing, and pulling objects up to 30 pounds, occasionally 30+ pounds; bending and twisting at the waist, reaching overhead, above the shoulders and horizontally; dexterity of both hands and fingers while performing duties; seeing to read, write and use the computer; hearing and speaking to exchange information, in person or on the telephone, and make presentations.