

MENLO PARK CITY SCHOOL DISTRICT
POSITION DESCRIPTION – CLASSIFIED MANAGEMENT
CHIEF BUSINESS OFFICER (CBO)

MAJOR ROLE

Under the direct supervision of the Superintendent, the Chief Business Officer is responsible for the organization and administration of the financial and business affairs of the District, such as the annual budget, payroll, purchasing, investment and risk management, and bond oversight/management.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

Budget, Finance, and Planning

- Develop and prepare annual budget and monitor income and expenditures of all district funds, making necessary reports to staff and the Superintendent, Cabinet, Board of Education, and public.
- Act as chief District representative to the Board's Finance and Audit Committee, prepare agendas, co-facilitate meetings with Chair, and provide necessary reports and documents.
- Conduct financial analysis including forecasting financial commitments and evaluating contracts and serve as the District investment manager including the administration of tax revenue and anticipation notes
- Assist the Superintendent in coordinating, planning and administering the District budgetary program working closely with the State's Office of Public School Construction (OPSC) and the State Allocation Board (SAB).
- Work closely with the Superintendent to operate an effective and efficient annual enrollment and registration process that accurately reflects student enrollment numbers for budgeting and staffing purposes.
- Oversee administration of parcel taxes and senior exemptions.

Accounting, Purchasing, and Billing

- Lead, administer, and supervise accountant, payroll, accounts payable/ receivable, and other accounting services within the District Business Office.
- Perform and/or supervise central accounting functions, forecasting revenue and expenditures, cash flow, fixed assets, negotiated bargaining agreements and all other related functions.
- Review all contracts, agreements and negotiations for legal form and maintain records covering insurance, policies and programs of the District.
- Supervise the assessment and collection of fees such as developer fees, facility use permits and others as required
- Prepare bid documents specifications and advertisements for major purchases and projects in accordance with the Public Contract Code.

Human Resource, Staffing, and Payroll

- Lead, administer, and supervise payroll and benefits of all staff accounts and other services related to employee compensation.
- Assist the Superintendent in the collective bargaining process serving as a District representative on negotiating teams.
- Ensure all communication duties related to AB1200 and any additional state/federally mandated finance or communication duties related to collective bargaining, and maintain district salary schedules.
- Maintain position control and administer personnel functions such as workers compensation, retiree benefits, health/dental programs, coordinating services with Human Resource programs.
- Assist in forecasting staffing needs based on enrollment projections.

Facility, Bond, and Programs

- Supervise food and nutrition programs including but not limited to the free and reduced lunch program.
- Supervise student health insurance and liability insurance for the district.
- Direct and oversee division activities, functions and programs, including the construction, renovation and maintenance of the school sites and administrative facilities.
- Assist the Director of Maintenance, Operations and Transportation to develop long-term maintenance planning District-wide, including a 25-year deferred maintenance plan, with the appropriate budget considerations to ensure the necessary funding over time.
- Act as chief District representative to the District Bond Oversight Committee providing necessary reports on facility development, budget and auditing
- Manage District budgets and maintain documentation related to bond projects including expenditure reports, development of purchase orders and tracking of projects.

Department Functions

- Supervise and effectively evaluate direct reports in the business department.
- Represent the District to Joint Powers Authorities for business and operations.
- Provide for the preparation of necessary reports required by County, State and Federal regulations such as J-200 series, J-90, Gann Limit, Deferred Maintenance, Developer Fees, Attendance, CBEDS, Modernization Projects, etc.
- Direct the District internal audit procedures and work cooperatively with the District's external auditor
- Ensure the efficiency and effectiveness of organizational staffing patterns, service levels, and administrative systems
- Act as a liaison to all governmental agencies related to budget and finance.
- Represent the District to local and State regulatory commissions and agencies developing necessary applications
- Respond to public records requests and any litigation regarding the business and finance of the district.
- Maintain public financial records, ensuring that the public can easily access them and increasing the clarity of the documents so that the public has the best chance of understanding them.
- Direct the identification and analyses of opportunities for service enhancements and continuous improvement of systems in all the areas above
- Carry out specific duties as assigned by the Superintendent

QUALIFICATIONS

Knowledge

- Leadership and management practice of accounting, business administration, budgetary, auditing, transportation, safety, security, maintenance, custodial, technology, construction and facilities.
- State laws and regulations; California School Accounting Standards; Governmental Accounting Standards; and, other regulations affecting District financial affairs.
- Principles of leadership organizational development, management practices, systems analysis, budgeting.
- Concepts and applications of electronic data processing, technology infrastructure and end-user technology solutions for all areas of responsibility
- Knowledge of capital construction functions of a school district
- Demonstrated facilitation, decision making, and problem solving abilities
- Knowledge of construction and planning process

Skills

- Strong people skills, initiation, problem solving and extensive service experience
- Possess in-depth analytical skills of financial data and be able to present complex data into cogent and meaningful information, producing appropriate interpretations, projections, recommendations, and courses of action to the Superintendent and Board and communicate this information to the stakeholders
- Analyze organizational and administrative problems and solve problems effectually using creative and innovative methods
- Direct the activities of individual and groups; monitor and evaluate progress
- Speaks and write clearly and concisely; prepare and deliver effective oral presentations
- Build cooperative work relationships to accomplish organizational goals

EDUCATION and EXPERIENCE

- Bachelor's degree or equivalent training in business, public administration or appropriate field. Masters degree preferred.
- Experience in school business, comparable private sector experience or related school operations