

SANTA CLARA COUNTY OFFICE OF EDUCATION

CLASS TITLE: CHIEF BUSINESS OFFICER

(Senior Classified Management)

BASIC FUNCTION:

Under the direction of the County Superintendent of Schools, the Chief Business Officer is responsible for planning, developing, coordinating, implementing, directing, and evaluating the departments of the Business, Facilities & Operations Division, including District Business Services, General Services, Internal Business Services and Risk Management; oversee business related services to school districts and the County Office of Education; serve as a member of the Superintendent's Cabinet; and perform all other assigned duties.

REPRESENTATIVE DUTIES:

The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.

ESSENTIAL DUTIES:

Participate as a member of the Superintendent's Cabinet in the overall planning and direction of County Office functions and services; advise the Superintendent regarding use of resources, priorities, program opportunities and methods to enhance the delivery of programs and support services; serve on County Office and statewide school business committees.

Plan, organize, control and direct operations and activities of the Business, Facilities & Operations Division; oversee and participate in finance activities including developing fiscal policies for districts, certifying State and federal reports, providing information and assistance to County Office and district personnel, and other activities as required; assure operations comply with established laws, rules and regulations.

Coordinate information and resources to assure smooth, efficient and accurate activities; coordinate meetings and in-services to provide information to administrators and personnel; serve as liaison to County Office personnel, districts and outside agencies as needed; resolve problems, provide information, answer questions and facilitate program activities and operations.

Direct and participate in the development and implementation of policies and operating procedures including fiscal policies for departments and standard operating procedures; provide information and support to assure operations are implemented in an accurate and timely manner; monitor activities to assure compliance with established procedures.

Conduct financial analysis for negotiations and project costs; provide consultation and technical expertise to the Superintendent, administrators, staff, outside organizations and others concerning finance issues, operations and activities; respond to inquiries, resolve issues and conflicts, and provide

detailed and technical information concerning related programs, goals, objectives, laws, codes, regulations, policies and procedures.

Oversee and approve County Office and district record and report preparation and maintenance; coordinate certification of school district revenue, special education entitlement reports and attendance reports to the state; oversee the filing of various data reports, payroll and financial and cost analysis.

Provide technical expertise, information and assistance to the Superintendent regarding district budgets and financial and accounting activities; keep abreast of proposed legislation pertaining to school finance in order to keep school districts advised; assist in the formulation and development of policies, procedures and programs to assure an economical, safe and efficient work environment; advise the Superintendent of unusual trends or problems and recommend appropriate corrective action.

Monitor and evaluate County Office finance functions and activities for effectiveness and operational efficiency; gather data, research financial information and conduct special projects with other County Office departments; receive and respond to staff and administrative input concerning budget, financial or accounting needs; oversee the development and implementation of policies, procedures and programs to enhance financial effectiveness and operational efficiency.

Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to personnel and assigned activities including financial and risk management records, interim and adopted budgets, unaudited actuals, accounting support services reports, and fiscal services reports.

Communicate with other administrators, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange information; collaborate with the California Department of Education, school districts, auditors and others as required.

Assure compliance with AB1200 budget approval, oversight, and monitoring activities for local school districts and coordinate the review of recommendations in school district audits and action taken on exception items.

Assure compliance with procedures for review and approval related to accountability under the Local Control Funding Formula.

Serve as advocate for Santa Clara County school districts in the business services area and confer with school district representatives on business matters and fiscal issues impacting California schools.

Represent the branch and/or County Office to State and Federal officials; make presentations to associations, community groups and others regarding County Office matters.

Develop and prepare the annual preliminary budget for the Business Services Department; coordinate budget review and approval process; analyze and review budgetary and financial data; control and authorize expenditures in accordance with established limitations.

Supervise and evaluate the performance of assigned department heads and staff.

Plan, organize and implement long and short-term programs and activities designed to develop assigned financial and accounting activities.

Maintain current knowledge of laws, rules and regulations related to assigned fiscal activities; compose and distribute informational bulletins to districts regarding reporting requirements, changes to financial accounting procedures or related matters; prepare and present workshops to provide current information on new or revised legislation and/or regulations and provide training for the financial software system.

Operate a computer and assigned software programs; operate other standard office equipment; drive a vehicle to conduct work.

Collaborate and coordinate emergency response and recovery activities as directed and needed.

Perform all other related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

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 and County Office of Education business activities. 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 county school office oversight of school districts.

Skills required to operate a computer and to utilize pertinent software programs.

ABILITY TO:

Effectively plan, organize, direct, coordinate and evaluate the programs and services of assigned areas of responsibility, including a broad range of diverse functions and responsibilities.

Make effective decisions and resolve problems affecting complex and sensitive areas and situations, and effectively explain and defend decisions.

Exercise sound judgment and recognize political and priority implications related to programs and strategies.

Demonstrate leadership, interpersonal consensus building and communication skills.

Establish and maintain effective working relationships with County Office and district leadership, staff, parents, community agencies, individuals and groups.

Exercise tact, diplomacy and recognize political and priority implications in developing and implementing programs and strategies.

Establish priorities, and evaluate the effectiveness of programs and services on an ongoing basis.

Function as a positive, contributing member of an education team.

EDUCATION AND EXPERIENCE:

REQUIRED MINIMUM TRAINING, EDUCATION, AND LICENSING: Master's degree with major course work in education administration, public administration, business administration (MBA) from an accredited college or university of higher education; hold a California Chief Business Official Certificate and a valid California driver's license.

REQUIRED MINIMUM PRIOR WORK EXPERIENCE: Seven (7) or more years of comprehensive and progressive directly related administrative experience. Prior experience as a business or fiscal director in a large California school district or county office of education.

REQUIRED INTERACTION (NON-AUTHORITY): Contacts have little or no predetermined structure, and are primarily with the highest level individual both inside and outside the Office, such as local, state, and district superintendents, district chief business officials, state and federal officials; and contacts require decision-making and problem-solving where office-wide, cross-branch concerns are at stake.

SUPERVISION OF OTHERS: Directly supervises assigned department heads, managers and other support staff.

REPORTS TO: County Superintendent of Schools.

WORKING CONDITIONS:

ENVIRONMENT: Indoor office environment.

The incumbent in this position will be required to work hours beyond the normal workday and participate in meetings, conferences and professional development activities locally and outside the area; frequent driving of a car and periodic travel will also be required.

PHYSICAL ABILITIES:

Hearing and speaking to exchange information in person and on the telephone.

Seeing to read, prepare and proofread documents, perform assigned duties.

Sitting or standing for extended periods of time.

Dexterity of hands and fingers to operate a computer keyboard and other office equipment.

Kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally as needed.

Lifting light objects.

Approved by the Personnel Commission: April 1, 2010

Revised: March 10, 2021



Marisa Perry

Date: 03/10/21

Director – HR/Classified Personnel Services