

**PLANO INDEPENDENT SCHOOL DISTRICT
Job Description**

Job Title:	Chief Financial Officer	Wage/Hour Status:	Exempt
Reports To:	Superintendent	Pay Range:	920
Dept./School:	Business Services	Date Revised:	9/2/2021

Primary Purpose:

Plan, organize, and manage all financial affairs of the district. Advise and assist the Board, Superintendent, and employees in matters relating to the finance and budget. Develop and recommend changes to and interpret policies and procedures related to the Business Services Department in compliance with federal, state, and local laws, regulations, and ordinances. Serve as chief financial advisor and budget advisor to the Superintendent and Board of Trustees.

Qualifications:

Education/Certification:

- Bachelors' degree (required)
- Master's degree (preferred)
- Certified Public Accountant (CPA) (preferred)
- Texas Association of School Business Officials Certification (preferred)

Special Knowledge/Skills:

- Advanced technical knowledge of school finance, budgeting and accounting systems, and economics
- Knowledge of Strategic Planning and Forecasting Methods
- Knowledge of information and financial applications
- Strong organizational, communication, public relations, and interpersonal skills

Experience:

- Five years of experience in finance and budget management in public education setting or equivalent experience
- Leadership in professional/civic organizations
- Experience in operations management, including facilities management, business services and purchasing
- Experience in bond planning and bond issuance

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Major Responsibilities and Duties:

Ensure that business operations are supportive of the instructional goals and objectives of the district

Familiarize oneself with the district's curricula and instructional implementation strategies and articulate the specific ways in which Business Services supports instruction

Communicate expectations that are consistent with district objectives related to financial management and budget planning

Develop long-range and short-term objectives for district's business operations and prepare district budget

Monitor budget variances and oversee budget adjustments

Contribute to the recommendation of sound policies directed toward improvement of the financial program of the district

Conceptualize, design, and implement innovative projects in areas of finance, budget, construction management, maintenance management and purchasing

Develop training options and/or improvement plans to ensure the best operation of the Business Services Department

Implement the policies established by federal and state law, State Board of Education rule, and the local Board policy in the business services area

Direct in the systematic monitoring of the use, care, replacement, and inventory of the capital equipment and properties

Implement and maintain control procedures to ensure the safeguarding of assets and reliability of accounting data and to promote operational efficiency and ensure adherence to prescribed procedures

Ensure preparation and integrity of all district general accounting records and related financial records using accepted standards for school accounting as prescribed by the Texas Education Agency

Maintain the district's investment portfolio and supervise and coordinate the investment of all available funds to the best interest of the school district to ensure that these funds are adequately protected against loss at all times

Monitor and participate in legislative deliberations

Management and oversight of enrollment and demographic projections

Provide leadership and management for district facilities department including construction, maintenance, and the district's custodial contract.

Provide leadership and management for the purchasing department including warehouse and distribution, print shop and asset control.

Management and oversight of accounting, financial audit, budget, budget hearings, bond issues, debt management, investment programs and bond elections

Provide leadership to achieve cost-effective practices throughout the district

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Direct and compile district, campus, and program budgets and cost estimates; prepare and submit financial reports as necessary

Articulate the district's mission to the community in the area of business services and solicit its support in making that mission become a reality

Develop educational materials for bond issues, tax issues, and other referenda that support the district's goals and objectives

Demonstrate an awareness of school-community needs and initiate activities to meet those identified needs

Supervisory Responsibilities:

Responsible for the staffing, supervision, and evaluations of a large group of employees in the Business Services Department

Working Conditions:

Mental Demands:

Maintain emotional control under stress; work with frequent interruptions

Physical Demands/Environmental Factors:

Frequent districtwide and statewide travel; occasional prolonged and irregular hours; frequent standing, stooping, bending, kneeling, pushing and pulling; prolonged use of computer and repetitive hand motions; occasional lifting up to 50 pounds

Acknowledgement:

Any work related experience or additional education/training resulting in acceptable proficiency levels in the above required knowledge, skills, and abilities may be an acceptable substitute for the above specified education and experience requirements at the sole discretion of District Administration.

Approved By: W. Noel McBee, Compensation Coordinator **Date:** 9/2/2021

The above statements are intended to describe the general purpose and responsibilities assigned to this job and are not intended to represent an exhaustive list of all responsibilities, duties, and skills that may be required. District administration and/or my supervisor has the right to add or change duties at any time. This job description supersedes all prior job descriptions for this position as well as rescinding all past and present job descriptions that do not reflect the current requirements of this position.

My signature below indicates I understand and acknowledge my job description.

Employee Signature: _____ **Date:** _____