

## LEXINGTON SCHOOL DISTRICT TWO JOB DESCRIPTION

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Position Title: Chief Financial Officer  
Department: Financial Services Division  
Reports To: Superintendent  
Prepared By: Dr. Angela Cooper, CHRO  
Approved By: Dr. Angela Cooper, CHRO

Date: January 25, 2021  
Date: January 25, 2021

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[Link to application](#)

### **GENERAL STATEMENT OF JOB**

Under limited supervision, plans, organizes, controls and directs all programs and activities of the Financial Services Division, including budget development for general operations, special revenue funds, debt service and capital projects, procurement, accounting, fixed asset accounting, cash and investment management, and financial reporting; oversees Transportation and Food Services department operations. Supervises and evaluates the work of subordinate staff, and performs related professional and administrative work as required. Reports to the Superintendent.

### **SPECIFIC DUTIES AND RESPONSIBILITIES**

#### **ESSENTIAL JOB FUNCTIONS**

- Plans, organizes, controls, and directs all programs and activities of the Financial Services Division, ensuring compliance with all applicable policies, procedures, laws and regulations.
- Supervises the maintenance, control and analysis of District fiscal operations.
- Supervises duties of assigned professional, supervisory and support staff; supervisory duties include instructing; assigning, reviewing and planning work of others; selecting new employees; maintaining standards; coordinating activities; allocating personnel; acting on employee problems; recommending and approving employee discipline and recommending discharge as appropriate. Reviews the work of subordinates for completeness and accuracy; evaluates and makes recommendations as appropriate; offers training, advice and assistance as needed.
- Provides for adequate staff training and development opportunities.
- Participates in the development, implementation, and adherence to District adopted financial and administrative policies; initiates goals, policies, and procedures related to all financial matters.
- Works with the management team and others in planning and implementing strategic plans for the future of the District.
- Assists the Superintendent in interpreting the financial position of the District to the Board of Trustees, District staff and general public.
- Forecasts revenues and expenditures for budget preparation and managerial decision-making purposes; monitors revenues and expenditures to ensure adherence to budget allocations.
- Develops, monitors and controls the District's annual budget for all district funds; serves as a budget control officer for the District.
- Works with legal counsel to assist with the issuance of bonds, tax anticipation notes other related debt.
- Supervises the collection, safekeeping, investment and distribution of all funds.
- Supervises payroll, employee benefits, accounts payable, print shop and warehouse/purchasing functions.
- Oversees the management of fixed assets.

- Oversees workers' compensation policy and related issues.
- Plans, coordinates and directs the installation of automated accounting systems and procedures.
- Researches, compiles and presents financial and statistical data related to the finances and operations of the District.
- Supervises the preparation of all financial reports as required by state and federal agencies.
- Prepares Management Discussion and Analysis reports for the audit.
- Supervises the development and monitoring of the District's internal control system.
- Receives and responds to inquiries, concerns and complaints regarding financial issues, policies and procedures and division services.
- Represents the District at various meetings as appropriate.
- Prepares and/or processes budget request proposals, financial analyses, other financial and administrative reports, policies and procedures, performance evaluations, memos, correspondence, etc.
- Operates a variety of equipment such as a computer, printer, copier, calculator, telephone, etc.; uses clerical, copier, computer supplies.
- Interacts and communicates with various groups and individuals such as the Superintendent, subordinates, other District administrators and staff, school administrators and staff, Board members, State Department of Education personnel, elected officials, various councils and committees, financial institutions, auditors and the general public.
- Attends training, seminars and conferences, and conducts research to stay abreast of legislation and trends in public financial management.

#### **ADDITIONAL JOB FUNCTIONS**

Reviews accounting transfers.

Performs routine administrative/office tasks as required, including but not limited to preparing reports and correspondence, copying and filing documents, answering the telephone, sending and receiving faxes, entering and retrieving computer data, etc.

Performs related duties as required.

#### **MINIMUM TRAINING AND EXPERIENCE**

Requires a Bachelor's degree in business administration, accounting, financial management or related field supplemented by eight or more years of professional accounting / financial management experience, or an equivalent combination of education, training and experience that provides the required knowledge, skills and abilities. Must possess a valid state driver's license.

#### **MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS**

**Physical Requirements:** Requires sedentary work that involves walking or standing some of the time and involves exerting up to 10 pounds of force on a recurring basis or routine keyboard operations.

**Data Conception:** Requires the ability to compare and/or judge the readily observable, functional, structural, or compositional characteristics (whether similar to or divergent from obvious standards) of data, people, or things.

**Interpersonal Communication:** Requires the ability of speaking and/or signaling people to convey or exchange information. Includes the giving of assignments and instructions to subordinates and co-workers. Includes the receiving of information and instructions from supervisor.

**Language Ability:** Requires the ability to read a variety of financial, administrative and statistical documents and reports. Requires the ability to prepare various types of reports and documents with the proper format, punctuation, spelling and grammar, using all parts of speech. Has the ability to speak before audience with poise, voice control and confidence.

**Intelligence:** Requires the ability to apply principles of logical thinking to define problems, collect data, establish facts and draw valid conclusions; to deal with several abstract and concrete

variables. Requires the ability to apply influence systems in managing a staff; to learn and understand relatively complex principles and techniques; to make independent judgments in absence of supervision; to acquire knowledge of topics related to primary occupation. Must have the ability to comprehend and interpret received information.

**Verbal Aptitude:** Requires the ability to record and deliver information, to explain procedures, to follow and give verbal and written instructions; to counsel and teach employees. Must be able to communicate effectively and efficiently in a variety of technical and/or professional languages including finance, accounting, investment management, budgeting, etc.

**Numeric Aptitude:** Requires the ability to add and subtract totals, to multiply and divide, to use mathematical formulas, to determine percentages and decimals and to determine time. Must be able to use advanced accounting mathematics and advanced applications of fractions, percentages, ratio and proportion.

**Form/Spatial Aptitude:** Requires the ability to inspect items for proper length, width, and shape.

**Motor Coordination:** Requires the ability to coordinate hands and eyes in using office equipment.

**Manual Dexterity:** Requires the ability to handle a variety of items, office equipment, control knobs, switches, etc. Must have minimal levels of eye/hand/foot coordination.

**Color Discrimination:** Requires the ability to differentiate colors and shades of color.

**Interpersonal Temperament:** Requires the ability to deal with people beyond giving and receiving instructions. Must be adaptable to performing under stress when confronted with emergency situations or tight deadlines. The worker may be subject to tension as a regular, consistent part of the job.

**Physical Communications:** Requires the ability to talk and hear: (talking: expressing or exchanging ideas by means of spoken words; hearing: perceiving nature of sounds by ear).

#### **PERFORMANCE INDICATORS**

**Knowledge of Job:** Has extensive knowledge of the methods, procedures and policies of the District as they pertain to the performance of duties of the Chief Financial Services Officer. Has considerable knowledge of the functions and interrelationships of the District and other governmental agencies. Is knowledgeable in the laws, ordinances, standards and regulations pertaining to the specific duties and responsibilities of the position. Is able to ensure division compliance with all laws and regulations and control the activities of the division through effective supervision. Is able to make sound, educated decisions. Has comprehensive understanding of the principles of finance, budgeting and accounting, and the standards, regulations and laws relating to financial accounting. Is knowledgeable of the implementation and control which must be exercised over the District's financial management systems and procedures. Is skilled in accounting/financial mathematics. Has thorough knowledge of government budget development and administration, government procurement procedures, collections, investment management, auditing and other functions of the division. Is capable of producing quality work which requires constant attention to detail. Knows how to plan, organize and direct a financial / professional and support staff. Knows how to apply supervisory and managerial concepts and principles; has knowledge of administrative principles involved in developing, directing and supervising various programs and related activities. Has the ability to offer instruction and advice to subordinates regarding departmental policies, methods and regulations. Is able to perform employee evaluations and to make recommendations based on results. Has the ability to offer training and assistance to co-workers and employees of other departments as required. Has the ability to use independent judgment and discretion in supervising various programs including the handling of emergency situations, determining procedures, setting priorities, setting schedules, maintaining standards, planning for future District needs and resolving problems. Has the ability to plan and develop daily, short- and long-term goals related to District purposes. Is able to take the initiative to complete the duties of the position without the need of direct supervision. Has the ability to plan, organize and prioritize daily assignments and work activities. Has good organizational, technical and human relations skills. Has the ability to learn and utilize new skills and information to improve job performance and efficiency. Has knowledge of proper English usage, punctuation, spelling and grammar. Has knowledge of modern office practices and technology; has skill in the use of computers for word and data processing and records management. Is able to read and

interpret complex materials pertaining to the responsibilities of the job. Is able to assemble and analyze information and make written reports and records in a concise, clear and effective manner. Has comprehensive knowledge of the terminology and various professional languages used within the department. Knows how to maintain effective relationships with personnel of other departments, professionals and members of the public through contact and cooperation. Knows how to react calmly and quickly in emergency situations.

**Quality of Work:** Maintains high standards of accuracy in exercising duties and responsibilities. Exercises immediate remedial action to correct any quality deficiencies that occur in areas of responsibility. Maintains high quality communication and interaction with internal and external entities with whom the position interacts.

**Quantity of Work:** Performs described Essential Functions and related assignments efficiently and effectively in order to produce quantity of work which consistently meets established standards and expectations.

**Dependability:** Assumes responsibility for completing assigned work. Completes assigned work within deadlines in accordance with directives, policy, standards and prescribed procedures. Maintains accountability for assigned responsibilities in the technical, human and conceptual areas.

**Attendance:** Attends and remains at work regularly and adheres to policies and procedures regarding absenteeism and tardiness. Provides adequate notice to higher management with respect to vacation time and leave requests.

**Initiative and Enthusiasm:** Maintains an enthusiastic, self-reliant and self-starting approach to meet job responsibilities and accountabilities. Strives to anticipate work to be accomplished, and initiates proper and acceptable action for the completion of work with a minimum of supervision and instruction.

**Judgment:** Exercises analytical judgment in areas of responsibility. Identifies issues or situations as they occur and specifies decision objectives. Identifies or assists in identifying alternative solutions to issues or situations. Implements decisions in accordance with prescribed and effective policies and procedures and with a minimum of errors. Seeks expert or experienced advice where appropriate and researches issues, situations and alternatives before exercising judgment.

**Cooperation:** Accepts supervisory instruction and direction and strives to meet the goals and objectives of same. Questions such instruction and direction when clarification of results or consequences are justified, i.e., poor communications, variance with established policies or procedures, etc. Offers suggestions and recommendations to encourage and improve cooperation intra- and inter-departmentally.

**Relationships with Others:** Shares knowledge with managers, supervisors and co-workers for mutual benefit. Contributes to maintaining high morale among all employees. Develops and maintains cooperative and courteous relationships inter- and intra-departmentally, and with external entities with whom the position interacts. Tactfully and effectively handles requests, suggestions and complaints in order to establish and maintain good will. Emphasizes the importance of maintaining a positive image.

**Coordination of Work:** Plans and organizes daily work routine. Establishes priorities for the completion of work in accordance with sound time-management methodology. Avoids duplication of effort. Estimates expected time of completion of work elements and establishes a personal schedule accordingly. Attends required meetings, planning sessions and discussions on time. Implements work activity in accordance with priorities and estimated schedules.

**Safety and Housekeeping:** Adheres to all established safety and housekeeping standards. Ensures such standards are not violated.

**Planning:** Plans, coordinates and uses information effectively to enhance activities and production. Knows and understands expectations regarding such activities and works to ensure such expectations are met. Develops and formulates ways, means and timing to achieve established goals and objectives. Effectively and efficiently organizes, arranges and allocates manpower, financial and other designated resources to achieve such goals and objectives.

**Organizing:** Efficiently organizes own work and that of subordinate staff. Ensures that personnel understand what results are expected of them, and that each is regularly and appropriately informed of all matters affecting or of concern to them.

**Staffing:** Works with upper management, where appropriate, to select and recommend employment of qualified personnel. Personally directs the development and training of personnel under charge, ensuring their proper induction, orientation and training.

**Leading:** Provides a work environment which encourages clear and open communications. Has a clear and comprehensive understanding of the principles of effective leadership and how such principles are to be applied. Provides adequate feedback to personnel under charge concerning their performance. Commends and rewards personnel under charge for outstanding performance, and takes timely and appropriate disciplinary action as necessary. Exercises enthusiasm in influencing and guiding others toward achievement of established goals and objectives.

**Controlling:** Provides a work environment which is orderly and controlled. Coordinates, audits, and controls manpower and financial resources efficiently and effectively. Coordinates, audits, and controls the utilization of materials and equipment efficiently and effectively. Has a clear and comprehensive understanding of established standards, methods and procedures.

**Delegating:** Assigns duties as necessary and/or appropriate to meet goals, enhance abilities of personnel under charge, build their confidence and assist them in personal growth. Has confidence in personnel under charge to meet new or additional expectations.

**Decision Making:** Exercises discretion and judgment in developing and implementing courses of action affecting functions under charge. Recognizes when a particular policy, procedure or strategy does not foster the desired result, and moves decisively and explicitly to develop and implement alternatives.

**Creativity:** Regularly seeks new and improved methodologies, policies and procedures for enhancing the effectiveness of functions under charge. Employs imagination and creativity in the application of duties and responsibilities. Is not adverse to change that supports achievement of goals and objectives.

**Human Relations:** Strives to develop and maintain excellent rapport with personnel under charge. Listens to and considers their suggestions and complaints, and responds appropriately. Establishes a work environment to promote and maintain mutual respect.

**Policy Implementation:** Has a clear and comprehensive understanding of policies regarding functions under charge and the function of the organization. Adheres to policies in the discharge of duties and responsibilities, and ensures the same from personnel under charge.

**Policy Formulation:** Maintains awareness of changes in operating philosophies and policies, and routinely reviews policies to ensure any changes in philosophy or practice are appropriately incorporated into functions under charge. Recognizes and understands the relationship between operating policies and practices and morale and performance. Strives to ensure that established policies enhance same.

**DISCLAIMER:** This job description is not an employment agreement or contract. Management has the exclusive right to alter this job description at any time without notice.