

OAKLAND UNIFIED SCHOOL DISTRICT

Office of the Superintendent of Schools

August 28, 2019

Legislative File	
File ID Number:	19-1710
Introduction Date:	08/28/2019
Enactment Number:	19-1332
Enactment Date:	8/28/19
By:	OS

TO: Board of Education

FROM: Kyla Johnson-Trammell, Superintendent
Tara Gard, Deputy Chief Talent Officer, Talent Division

SUBJECT: Approval of Creation of Job Descriptions – Analyst, Position Control and Senior Executive Director, Accounting

Creations:

1. Analyst, Position Control;
2. Senior Executive Director, Accounting.

ACTION REQUESTED

Adoption by the Board of Education of Resolution No. 1920-0134, Creating Job Descriptions - Analyst, Position Control and Senior Executive Director, Accounting.

DISCUSSION

The Talent Division recommends approval of these job descriptions as part of its ongoing work to revise and update the job classifications needed to implement the strategic plan, create greater clarity of roles, and have a written job description that reflects the scope and responsibilities for every position in the District.

Creation:

Job Description/Position/Title/FTE
Analyst, Position Control
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA 16
Range: \$73,964 - \$94,399
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

This is a new position that is required as part of the Fiscal Vitality initiative and is recommended through by the Intensive support team. This position will be funded with an allocation from the end fund balance or through attrition.

Creation:

Job Description/Position/Title/FTE
Senior Executive Director, Accounting
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA 28
Range: \$130,685 - \$166,806
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There is no new budget impact as this position will be created by the elimination of a current vacancy within the department.

RECOMMENDATION

Adoption by the Board of Education of Resolution No. 1920-0134, Creating Job Descriptions - Analyst, Position Control and Senior Executive Director, Accounting.

**RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
Resolution No. 1920-0134**

- Creating Job Descriptions - Analyst, Position Control and Senior Executive Director, Accounting.-

WHEREAS, it is the goal of the Oakland Unified School District to ensure organizational effectiveness, efficiency and accountability to further student achievement; and

WHEREAS, it is the intent of the District to develop a structure which focuses on providing high standards of service and increasing accountability across the system; and

WHEREAS, the job description aligns with the District's priority of a Full Service Community School District and to enhance service our students, schools and community, and

NOW, THEREFORE, BE IT RESOLVED that the Board of Education hereby determines that the following positions are created or revised as set forth in the attachments and shall be established on the respective salary schedule/range effective 12:01 a.m., August 28, 2019, as follows:

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Job Description/Position/Title/FTE
Analyst, Position Control
(As Assigned) (1.0 FTE)

Salary Schedule/Range

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12 months, 261 days, 7.5 hours (FT)

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Job Description/Position/Title/FTE
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FISCAL IMPACT

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BE IT FURTHER RESOLVED, that the Board authorizes the creation of job descriptions as so stated above.

Passed by the following vote:

PREFERENTIAL AYE: None

PREFERENTIAL NOE: None

PREFERENTIAL ABSTENTION: None

PREFERENTIAL RECUSE: None

AYES: Jumoke Hinton-Hodge, Gary Yee, James Harris, Shanthi Gonzales, Vice President Jody London, President Aimee Eng

NOES: None

ABSTAINED: None

RECUSE: None

ABSENT: Student Director Garibo, Student Director Smith-Dahl, Roseann Torres

CERTIFICATION

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District held on August 28, 2019.

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OAKLAND UNIFIED SCHOOL DISTRICT



Aimee Eng
President, Board of Education



Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education

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OAKLAND UNIFIED
SCHOOL DISTRICT

Position Description

TITLE:	Analyst, Position Control	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	Budget	CLASSIFICATION:	Confidential Management
FLSA:	Exempt	WORK YEAR/HOURS:	261 days / 7.5 hours
ISSUED:	Created: August 2019	SALARY GRADE:	CFCA 16

BASIC FUNCTION: Under general supervision, performs a variety of complex technical and specialized functions to support budgeting and position control. The Position Control Analyst shall assure detailed and strict implementation of the District’s approved budget, establish and maintain statistical records and reports, maintains position control as it integrates with budget, personnel and payroll systems; researches, reviews and analyzes complex and technical budget and position control data and records.

REPRESENTATIVE DUTIES: Incumbent 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 are intended to accurately reflect the principal job elements.

ESSENTIAL FUNCTIONS:

This position shall ensure that each position in the District has its own unique position control number and is an entity separate from the incumbent(s) in that position. Information about positions shall be tracked over time regardless of changes to the incumbents’ history, FTE distribution, termination, or other elements. Position history tracking shall be separate from the changes within incumbents. Positions shall be tracked even when there are no incumbents to fill specific positions.

Participates in the budget process, including review and analysis to ensure that all positions budgeted are appropriately entered in the position control system; ensures changes made to positions during the budget process are updated in the management systems.

Creates and reviews position control reports; creates and enters new positions into the position control system and updates existing position information; maintains position vacancy lists with respect to position control and staffing allocations.

Maintains the position control tracking systems; calculates the cost of position changes and ensures all appropriate approvals are received; reviews budget and position control information and verifies position and funding requests and expenditures comply with established guidelines and coding standards; reviews and authorizes changes to positions, hours/FTE, and account codes; notifies school sites and departments of approvals or concerns.

Monitors budget expenditures for assigned programs and communicates with sites and departments regarding spending levels and budget activity; reviews and approves program funding transfers to maintain position control; participates and prepares staffing allocation studies and surveys; provides and generates reports to verify employees and positions are assigned to the appropriate school site or department.

Develops, calculates and maintains position control tables; processes information from the position control system into the budget system and ensures both are appropriately updated for changes and in sync; creates and maintains essential master tables for the position control system.

Collaborates with respective district school sites and departments, County office, and the lead system administrators with updates, releases, and modifications to the position control system.

Develops and generates reports to extract data from the position control system to ensure accuracy of data input and maintenance; analyzes data and makes adjustments as necessary.

Work closely with Directors of Budget, Accounting, and the Talent Division Analyst, HRIS Internal Audit, on issues of FTE and Requests for Position Change as they relate to position control.

Communicate with Payroll Supervisor and clerks regarding position control issues.

Reconcile position assignments and Payroll at 1st and 2nd interim reporting periods.

Work with staff in Budget, Audit and Attendance to run salary projections, and reconcile positions.

Work with Technology Department regarding issues with Position Control module.

Receive and review all Position Change Requests for authorized signatures/approvals and validates positions in information systems, researched and track all requests.

Assist Assistant Superintendent of Business or designee with staffing projections and allocations to sites.

Roll Position Control into new school year information system and perform year-end closing functions.

QUALIFICATIONS:

The District determines whether a candidate is qualified based on fulfillment of prerequisites, relevant work experience, ability to perform the essential functions, reference checks, effective interpersonal and communication skills demonstrated by interview performance and/or writing samples, and achievement on performance-based assessments (if applicable) that demonstrate the candidate possesses the requisite knowledge, skills and abilities. Meeting prerequisites only satisfies the initial screening process and does not indicate the candidate is qualified to perform the essential functions of the position.

KNOWLEDGE OF:

Specific knowledge required to satisfactorily perform the functions of the job include: principles and practices of position control management; rules and regulations governing position control; advanced research techniques; Federal, state and local laws, regulations and guidelines governing the budget process; operations, policies and objectives

Methods of auditing budget and position control transactions.

Computer applications including word processing, spreadsheet and relational database applications.

Business Reporting techniques and systems.

California school district budgeting and accounting procedures.

ABILITY TO:

Communicate both orally and in written correspondence at a highly professional level.

Interpret, apply and explain applicable procedures, rules and regulations. Meet schedules and timelines.

Perform position control and statistical projects.

Develop mathematical and statistical computations with speed and accuracy.

Establish and maintain files.

Perform tasks in Microsoft Excel and relational databases.

Operate a variety of office equipment that include calculations, data entry, access and amendments to data base information.

Understand the ability to carry out and follow oral and written directions.

Problem solve issues to identify and propose resolutions that involve position control.

Communicate effectively in person, over the telephone and in writing.

Highly developed interpersonal skills to diplomatically address administrators and employees questions and concerns. Exercise initiative and work independently on assigned projects.

Establish and maintain cooperative working relationships with those contacted in the course of work.

PREREQUISITES:

Any combination of education, training and/or experience equivalent to: a Bachelor's degree with a major in finance, economics, or business administration, human resources, accounting or a related field.

Three years successful experience in finance, bookkeeping, accounting or human resources in a high volume customer service environment.

Responsible experience in a school district office that includes duties involving budgets, grants or detailed statistical reports or a public agency or private human resource or business office working in position control, staff budgeting or comparable area is preferred.

Valid California Driver's License

Employment eligibility will include fingerprints, Tuberculosis and/or other employment clearance

PRE-EMPLOYMENT PROCESS:

Employment eligibility that may include fingerprints, tuberculosis and/or other employment clearance.

**WORKING CONDITIONS:
ENVIRONMENT:**

Office environment; rapid-paced work, constant interruptions

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing and pulling objects; heavy physical labor; bending and twisting at the waist, climbing stairs and ladders; bending head or body forward and downward; 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.

NON-DISCRIMINATION POLICY:

The Oakland Unified School District does not discriminate in any program, activity, or in employment on the basis of actual or perceived race, religion, color, national origin, ancestry, age, marital status, pregnancy, physical or mental disability, medical condition, genetic information, veteran status, gender, sex, or sexual orientation.

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OAKLAND UNIFIED
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Position Description

TITLE:	Senior Executive Director, Accounting	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management Confidential
FLSA:	Exempt	WORK YEAR/HOURS	261 days/7.5 hours
ISSUED:	Created: August 2019	SALARY GRADE:	CFCA 28

BASIC FUNCTION: Provide dedicated support to the Chief Financial Officer on strategic, District-wide analyses and financial reporting to local, state and federal governments. Responsible for planning, organizing and directing the District's accounting functions, including payroll, accounts payable, billings and receivables and general ledgers; to insure compliance with applicable laws, regulations and policies; to prepare financial statements, projections and analyses; to assist in the development of the District budget; and to perform other job-related duties as required.

Maintain confidentiality of all personnel matters; some duties will involve access to confidential information concerning employer-employee relations.

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 accurately reflect the principal job elements).

ESSENTIAL FUNCTIONS

Plans, organizes, directs and evaluates the work of the accounting office staff, either directly or through Subordinate supervisors.

Plans, organizes, directs and evaluates the work of other departments within the financial services division, either directly or through Subordinate supervisors. Determined and assigned by the Chief Financial Officer.

Manage financial reporting and analysis for the District.

Participates in the design and coordinates implementation of improved fiscal policies and procedures for the District.

Interpret District accounting and financial policies and methods for the District's management team.

Supervise the operation of the District's financial books of record including opening, posting, adjusting and closing of general ledger and subsidiary ledger accounts for all District funds.

Prepares monthly/quarterly financial position and cash flow statements, budget transfers, cost studies and other financial schedules and reports. Provides liaison with external auditors.

Direct analysis including rolling cash flow projections, debt restructuring, fixed asset management and revenue and expense projections based on student enrollment.

Assists in compiling periodic revised estimates of the current year's budget and in developing next year's budget.

Review, analyze and report on financial policy revisions as necessary.

Reviews and analyzes financial statements and various reports in order to summarize and track income and expenditures.

Plan and assign staff to specific projects and tasks.

Coordinate with the Financial Services, Payroll and Human Resources Managers.

Monitors District-wide compliance with internal accounting controls, policies, procedures and applicable laws and regulations.

Enhance customer service through the continued implementation of reporting and processing improvements.

Perform related duties as assigned.

QUALIFICATIONS:

The District determines whether a candidate is qualified based on fulfillment of prerequisites, relevant work experience, ability to perform the essential functions, reference checks, effective interpersonal and communication skills demonstrated by interview performance and/or writing samples, and achievement on performance-based assessments (if applicable) that demonstrate the candidate possesses the requisite knowledge, skills and abilities. Meeting prerequisites only satisfies the initial screening process and does not indicate the candidate is qualified to perform the essential functions of the position.

KNOWLEDGE OF:

Principles and techniques of personnel management and supervision

California public school district finance

Strategies and techniques for customer service

Accounting-related rules, laws, regulations, and procedures of the Education Code and the District

Proficiency with California Public School financial regulations, compliance, and audit requirements

Principles of business management, including office methods, procedures, and equipment

Operation of personal computers and financial software

ABILITY TO:

Analyze , interpret, apply and explain accounting and budgeting principles and procedures;

Work with paperless financial services systems

Audit and verify financial documents and reports;

Work under minimal supervision, exercise sound judgment and initiative in an environment of rapid change

Perform advanced financial analysis and prepare complex financial studies

Use and leverage computer-based accounting applications

Analyze data, draw logical conclusions, and prepare comprehensive reports;

Build highly-functioning relationships with colleagues both inside and outside of the Financial Services Division

Maintain a high degree of integrity in the maintenance of financial records;

Communicate effectively, orally and in writing.

PREREQUISITES:

Any combination of education, training and/or experience equivalent to: a Bachelor's degree with major coursework in accounting, economics, business administration or a related field or possession of a CPA certificate and seven years' experience including three years in public school district accounting.

Five years' experience managing personnel.

Accounting and budgeting principles and procedures in a public agency setting. California school district accounting experience preferred.

Demonstrated understanding of federal and state compliance policies.

Certified Public Accountant preferred.

Valid California Driver's License.

PRE-EMPLOYMENT PROCESS:

Employment eligibility that may include fingerprints, tuberculosis and/or other employment clearance.

WORKING CONDITIONS:

ENVIRONMENT:

Indoor office setting; fast-paced work, constant interruptions.

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing and pulling objects; heavy physical labor; bending and twisting at the waist, climbing stairs and ladders; bending head or body forward and downward; 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.

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