

OAKLAND UNIFIED SCHOOL DISTRICT

Office of the Superintendent of Schools

January 9, 2019

Legislative File	
File ID Number:	18-2673
Introduction Date:	01/09/2019
Enactment Number:	
Enactment Date:	
By:	

TO: Board of Education

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

SUBJECT: Approval of Creation/Revision of Job Descriptions – Multiple Departments

Creations:

1. Assistant Director, Payroll;
2. Program Manager, Middle School Operations.

Revisions:

1. Manager, Fixed Assets and Insurance Solutions;
2. Specialist, Charter School Policy.

ACTION REQUESTED

Adoption by the Board of Education of Resolution No. 1819-0081, approving the creation and/or revision of the following job descriptions: Assistant Director, Payroll; Program Manager, Middle School Operations; Manager, Fixed Assets and Insurance Solutions; Specialist, Charter School Policy.

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

Assistant Director, Payroll
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA
Range: 20: \$88,448 to \$112,871
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There will be minimal budget impact as this role is replacing the previous position of Manager, Payroll Customer Service, which has recently become vacant.

Creation:

Job Description/Position/Title/FTE

Program Manager, Middle School Operations
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL
Range: 14: \$77,575 to \$99,008
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There is no new budget impact as this role is funded through the elimination of the former executive office assistant role.

Revision:

Job Description/Position/Title/FTE

Manager, Fixed Assets and Insurance Solutions
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA
Range: 20: \$88,448 to 112,871
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There is no new budget impact as this role had already been in place and this job description formalizes the duties.

Revision:

Job Description/Position/Title/FTE

Specialist, Charter School Policy
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL
Range: 11: \$67,028 to \$85,546
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There is no new budget impact as this role is not funded by General Fund money; oversight fees charged directly to Charter Schools in OUSD fund this role.

RECOMMENDATION

Adoption by the Board of Education of Resolution No. 1819-0081, approving the creation and/or revision of the following job descriptions: Assistant Director, Payroll; Program Manager, Middle School Operations; Manager, Fixed Assets and Insurance Solutions; Specialist, Charter School Policy.

**RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
Resolution No. 1819-0081**

- Approval of the Creation/Revision of Job Descriptions – Assistant Director, Payroll; Program Manager, Middle School Operations; Manager, Fixed Assets and Insurance Solutions; Specialist, Charter School Policy - Multiple Departments, As Assigned -

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., January 9, 2019, as follows:

Creations:

1. Assistant Director, Payroll;
2. Program Manager, Middle School Operations.

Revisions:

1. Manager, Fixed Assets and Insurance Solutions;
2. Specialist, Charter School Policy.

Creation:

Job Description/Position/Title/FTE

Assistant Director, Payroll

(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA

Range: 20: \$88,448 to \$112,871

12 months, 261 days, 7.5 hours (FT)

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(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL
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FISCAL IMPACT

There is no new budget impact as this role is funded through the elimination of the former executive office assistant role.

Revision:

Job Description/Position/Title/FTE

Manager, Fixed Assets and Insurance Solutions
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA
Range: 20: \$88,448 to 112,871
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

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Revision:

Job Description/Position/Title/FTE

Specialist, Charter School Policy
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL
Range: 11: \$67,028 to \$85,546
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

There is no new budget impact as this role is not funded by General Fund money; oversight fees charged directly to Charter Schools in OUSD fund this role.

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

Passed by the following vote:

PREFERENTIAL AYE:

PREFERENTIAL NOE:

PREFERENTIAL ABSTENTION:

PREFERENTIAL RECUSE:

AYES:

NOES:

ABSTAINED:

RECUSE:

ABSENT:

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 January 9, 2019.

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OAKLAND UNIFIED SCHOOL DISTRICT

Aimee Eng
President, Board of Education

Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education

Legislative File	
File ID Number:	18-2673
Introduction Date:	1/9/2019
Enactment Number:	
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By:	



OAKLAND UNIFIED SCHOOL DISTRICT

Position Description

TITLE:	Assistant Director, Payroll	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management Confidential
FLSA:	Exempt	WORK YEAR/HOURS:	261 Days/7.5 hours
ISSUED:	Created: December 2018	SALARY GRADE:	CFCA 20

BASIC FUNCTION: Under minimal direction of the Director of Payroll, organize and direct the accounting activities involved in the preparation and processing of District payrolls to assure classified and certificated employees are paid in an accurate and timely manner; direct and participate in the preparation, maintenance, processing and auditing of manual and automated payroll data, records and reports; train and evaluate the performance of assigned personnel.

The Assistant Director will perform a variety of difficult, technical duties requiring excellent communication and customer service skills; utilize specialized knowledge and independent judgment to solve payroll issues and concerns involving frequent and responsible public contact; communicate effectively, both orally and in writing, to internal and external customers using District and department set standards to provide for accurate and timely responses to inquiries.

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

DISTINGUISHING CAREER FEATURES

The position performs work which is complex and technical in nature. Initiate business process analyses and design. Serve as technical advisor and resource. Work with departments, payroll staff and Payroll Director to apply workflow principles and techniques. Primarily work is performed independently, guided by California Education Code, Board Policy, state pension retirement laws and standard operating procedures.

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:

Provide oversight of payroll compliance issues including collection, calculation, and input of payroll information for submittal to ACOE Payroll Processing System.

Respond to payroll related inquires and issues; provide superior customer service to internal and external customers, both verbally and written, using departmental procedures and processes to ensure questions, problems and concerns are handled accurately and in a timely manner; answer the main payroll line and route calls as appropriate; assist with unexpected/urgent situations as needed.

Research issues resulting from both written and verbal inquiries utilizing multiple resources and systems and analyze discrepancies and process appropriate corrections; resolve problems and recommend solutions and process

improvements; conduct follow up review to ensure that issues were resolved as intended within the specified time frame.

Route online pay concerns to the department best suited to handle the issue (i.e., Payroll, HR and/or Benefits).

Organize and direct payroll operations and activities to ensure employees are paid in an accurate and timely manner; oversee the processing of payroll-related forms and applications; ensure payroll activities comply with established laws, codes, regulations, policies and procedures.

Coordinate, oversee and participate in the preparation and maintenance of a variety of automated and manual records and reports related to the payroll function including quarterly and yearly payroll reports, analysis of payroll records and payroll accounting reports.

Review information for accuracy; identify discrepancies; make corrections and resolve problems as necessary; ensure accuracy of personnel information.

Supervise the processing of new hires, retirements and terminations; verify related documents for proper employee information, pay rates and related data; provide oversight of all time cards, monthly payroll processing and data input including regular pay, extra pay, absence pay, voluntary deductions, retroactive pay, garnishments, overtime and overpayments and other payroll related items; organize payroll staff work flow; assign employee duties and reviews work for accuracy, completeness and compliance with established requirements.

Develop and provide staff training in the use of technology, office systems, and procedures.

Perform complex and technical payroll operations including payroll audits and reconciliations; conduct and provide oversight for site and program payroll audits.

Resolve technical payroll and payroll accounting issues.

Perform benefit expenditure and related transfers to various accounts.

Review methods and procedures for tracking sick time, vacation balances, and other payroll related leaves to ensure accuracy and that all laws and regulations are being followed.

Collaborate with Human Resources and Fiscal Services Departments to ensure that employees are paid correctly, charged to the proper accounts and validation of records is completed between the Human Resources, Payroll, and Fiscal Systems.

Serve as a liaison between Payroll, Human Resources, Benefits and various other departments and personnel concerning District payroll functions; assure payroll issues, conflicts and discrepancies are resolved in a proper and timely manner.

Serve as a technical resource for District and school site staff regarding payroll procedures: understand systems and assist in analyzing, developing, communicating and implementing system and process improvement.

Represent the Payroll Director, when absent or as necessary, at meetings and committees; assist with various projects as needed.

Prepare quarterly tax returns and various supplemental payroll reports.

Assist in providing information for collective bargaining agreements.

Coordinate certificated and classified retirement plans with the State.

Provide information to staff concerning payroll techniques, procedures, guidelines and regulations; assist in coordinating accounting activities to meet established payroll time lines.

Communicate with personnel and various outside agencies to exchange information, coordinate activities and resolve issues or concerns.

Maintain a positive work atmosphere by acting and communicating in a manner which facilitates the successful resolution of all payroll questions, problems and concerns.

Take ownership and responsibility by owning the customer's issues to ensure resolution and complete follow-up.

Supervise and evaluate the performance of assigned personnel; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions; assist in screening applications, interviewing, and recommending candidates for employment within the payroll department.

Attend and conduct a variety of meetings as assigned.

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:

Conflict resolution

Applicable federal, state, and District codes, regulations, policies and procedures related to public school payroll and retirement systems

Creditable earnings rules and reporting for PERS and STRS

Payroll, payroll taxes and other deductions, general accounting application and computerized spreadsheet programs

Organization and direction of payroll operations and activities

Advanced principles and techniques involved in payroll preparation and processing

Tax withholding, voluntary deductions, garnishments and supplemental insurance

Preparation, maintenance, verification and processing of payroll records and reports

Generally accepted accounting principles, practices and procedures

Preparation, review and control of assigned accounts

Organizational payroll policies and objectives

Financial and statistical record-keeping techniques

Preparation of financial statements and comprehensive accounting reports

Applicable laws, codes, regulations, policies and procedures

Advanced payroll functions of an educational organization

Principles and practices of data processing

Principles and practices of supervision and training

Technical aspects of field of specialty

Diverse academic, socio-economic, cultural, ethnic, and disability backgrounds of District students

Exceptional English usage, grammar, spelling, vocabulary and punctuation

Computer software, hardware, and related technology

ABILITY TO:

Organize and direct payroll operations and activities to ensure classified and/or certificated employees are paid in an accurate and timely manner

Coordinate, oversee and participate in the preparation and maintenance of a variety of automated and manual records and reports related to the payroll function

Direct and participate in the preparation and maintenance of various financial and statistical records, reports and statements related to employees and payroll

Train and evaluate the performance of assigned personnel

Coordinate communication, information and personnel to ensure smooth and efficient payroll activities

Ensure proper and timely resolution of payroll discrepancies, issues and conflicts

Monitor, audit, adjust and reconcile payroll data

Identify, investigate and resolve financial errors and discrepancies

Compare numbers and detect errors efficiently

Participate in the development and implementation of payroll system enhancements

Interpret, apply and explain laws, codes, rules, regulations, policies and procedures

Communicate effectively both orally and in writing

Establish and maintain cooperative and effective working relationships with others

Operate a computer and assigned office equipment

Determine appropriate action within clearly defined guidelines

Make arithmetic computations with speed and accuracy

Prepare detailed and concise records, files and reports

Effectively and efficiently select and use technology in support of payroll and office functions

Evaluate and update regularly payroll department practice and procedures

Meet schedules and time lines

Work independently with little direction

Plan and organize work.

PREREQUISITES

Bachelor's Degree in Business Administration, Accounting, Finance or related field and four (4) years increasingly responsible experience in payroll, or Associate Degree in Business Administration, Accounting, Finance or related field and six (6) years of payroll related experience, including two years in a supervisory capacity

Experience in a public agency is preferred

Experience in managing all payroll functions for a large complex organization

Experience developing and facilitating high functioning collaborations and teams

Demonstrated success in systems and payroll management

Valid California Driver's License, if applicable

PRE-EMPLOYMENT PROCESS:

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

WORKING CONDITIONS

ENVIRONMENT:

Office and diverse school site environments; driving a vehicle to conduct work; fast-paced work; constant interruptions

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing, and pulling objects up to 30 pounds, occasionally 30+ pounds; bending and twisting at the waist, 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 SCHOOL DISTRICT

Position Description

TITLE:	Program Manager, Middle School Operations	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management
FLSA:	Exempt	WORK YEAR/HOURS:	261 days / 7.5 hours or duty days and hours as assigned
ISSUED:	Created: November 2018	SALARY GRADE:	ADCL 14

BASIC FUNCTION: Under general supervision, the Program Manager, Middle School Operations is responsible for planning and directing special projects for the Middle School Network Superintendent. Under the supervision of the Middle School Network officer, the Program Manager manages and coordinates the implementation of department projects and manages various department-related strategic and operational projects and initiatives, including Measure G1, Salesforce, and other MS related grants and operational support. These projects will require collaboration across functional teams and departments throughout Oakland Unified School District.

Act as a liaison between the Network Superintendent, the direct reporting management team, and school sites aligning execution of goals, removing roadblocks, performing analysis and gathering research to facilitate effective decision-making, and ensuring communication and reporting are happening smoothly and consistently.

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

Middle School Grants (such as Measure G1, Salesforce, OGO) Operations and System Development

Lead and take overall responsibility for planning, organizing, and directing long and short-term special projects, which potentially span across Middle School Network office's functional areas across the District.

Collaborate with Division leadership to determine which policies, practices and procedures impacting departmental success should be prioritized for engagement, review and updated/changed.

Assist in the development of procedures, policies, record-keeping and duties related to overall management and administration of projects, as required.

Develop critical path or project flow diagrams to evaluate progress on tasks.

Establish and communicate project schedules and milestones.

Assist Division leadership and staff with root cause analysis and corrective action activities.

Ensure designated projects produce required deliverables as proposed within specified constraints.

Provide technical expertise, information and assistance to the Middle School Network officer regarding assigned functions.

Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files.

Provide direction, coordination and support of special projects related to the financial planning, budgeting process, and expenditure reporting as required for internal management of the Middle School Network office for conformance to District financial policies and procedures.

Integrate change management framework and activities in strategic projects, i.e., Measure G1, Salesforce, etc.

Communication and Middle School Operational Support

Ensure ongoing monitoring of projects and provide updates on progress of projects to stakeholders-reports will include progress updates, problems, proposed solutions and whether the project is on schedule.

Synthesize, translate and communicate complex topics and issues (including District policies and programs) to a wide range of audiences.

Respond to parent and/or community inquiries; work with schools and departments to resolve concerns of parents and community of a routine nature that are directed to the Network Superintendent.

Maintain approved budgets and transaction records; processes requisitions, claims and requests for budget allocation changes and reassignment of funds to and from various accounts, coordinating with fiscal staff to ensure compliance.

Accountability and Financial Oversight

Assist the Middle School Network officer and Division leadership in identifying significant change opportunities via data collection, analysis and evaluation; and opportunities to support core business objectives by challenging conventional thinking and applying a customer-focused approach across processes.

Convene, facilitate, and/or serve on committees, task forces and ad hoc groups as necessary to coordinate functions for assigned areas of responsibility.

Develop collaborative service delivery methods, teams, and organizational structure in the context of increased effectiveness; encourage effective new practices and methods; assure coordination of divisional activities with other units and designated priorities, provide status reports on progress of priorities; contribute to Middle School Network office improvement efforts.

Manage the agenda for the management team and all Middle School Network office staff, including off-site retreats to ensure communication and coordination between teams is as efficient as possible.

Actively engage Division staff in support of the Department and District's mission to improve student achievement.

Approve all categorical requisitions and contracts from departments and school sites; review and advise on compliance issues as needed.

Ensure staff assigned to projects is competent for the role they are undertaking and provide management to staff as required; monitor the performance of project team members so optimum service and value is realized; develop project objectives for the team, monitor performance and provide guidance as required.

Manage, motivate, develop and evaluate assigned staff; includes hiring, resource allocation, coaching, performance management, and development of staff.

Attend department and other meetings as required.

Travel to school sites as needed.

Provide cross-training to other staff members within the department.

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:

Project management principles and methodologies

Strategic direction of Oakland Unified School District

Organizational development and organizational change management principles and practices

Applicable federal, state and District codes, regulations, policies and procedures governing work scope

Planning, organization and coordination needed for assigned program

Diverse academic, socio-economic, cultural, ethnic, and disability backgrounds of District students and staff

Interpersonal skills using tact, patience and courtesy

Correct English usage, grammar, spelling, vocabulary and punctuation

Computer software, hardware and related technology

ABILITY TO:

Coordinate and supervise special projects, capital projects and consultant studies

Accurately analyze situations and problems relating to projects, identify alternative solutions, project consequences of proposed actions, and implement an effective course of action in accordance with general policy and pertinent codes and regulations

Explain complex problems and solutions in clear, concise and compelling ways

Maintain confidentiality at all times

Understand and interpret District policies and procedures; be able to incorporate them into practice and explain them to others.

Design, develop and implement broad strategic initiatives and work plans and evaluate their outcomes

Facilitate discussion and learning activities towards a clear end

Establish and maintain effective working relationships with others of diverse backgrounds, expertise and personalities

Motivate and support adults to transform their practices

Serve as a resource to District administrators and facilitate communication throughout the District

Set goals, work independently and drive results

Produce high quality work, including strong attention to detail

Manage multiple assignments, priorities, and projects in a demanding environment

Adapt to feedback and focused on continuous improvement

Communicate effectively with other Departments and school sites

Learn new software applications and assist sites in using Academic database tools

Work as an integral member of a team

Operate personal computer, related software, and other office equipment

PREREQUISITES

Bachelor Degree or its equivalency required (2 years of similar and relevant work level experience = 1 year of college) in Education, Business Administration or related field. A combination of experience and education may be used to meet the Bachelor Degree requirement; however, the work experience years used to qualify for the Bachelor Degree requirement cannot be used to meet the work requirement

Three (3) years experience in project management at school sites and in supporting large strategic initiatives

Experience should include project management techniques and tools, group organization, communications, material preparation, task management, and cost and benefit financial analysis

Knowledge of both theoretical and practical aspects of project management preferred

Valid California Driver's License

Must have reliable transportation to perform duties, including valid California Driver's License and insurance

PRE-EMPLOYMENT PROCESS:

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

WORKING CONDITIONS

ENVIRONMENT:

Office and diverse school site environments; driving a vehicle to conduct work; fast-paced work; constant interruptions

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing, and pulling objects up to 30 pounds, occasionally 30+ pounds; bending and twisting at the waist, 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 SCHOOL DISTRICT

Position Description

TITLE:	Manager, Fixed Assets and Insurance Solutions	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management Confidential
FLSA:	Exempt	WORK YEAR/HOURS:	261 Days/7.5 hours
ISSUED:	Created: November 2018	SALARY GRADE:	CFCA 20

BASIC FUNCTION: The Fixed Assets and Insurance Solutions Manager coordinates the maintenance of property records for all land, land improvements, buildings, building improvements, machinery, and equipment owned by the Oakland Unified School District (OUSD). This includes coordinating receiving, maintaining a real time inventory, and periodic reporting on all fixed assets to be included in the District’s annual financial statements and for insurance valuation. The Fixed Assets and Insurance Solutions Manager also oversees the ongoing operations of the District’s Fixed Assets program, and supports its development and implementation. The Manager also manages, plans, organizes, the District’s insurance programs.

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

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:

Fixed Assets:

Coordinate the periodic appraisal of all real and personal property for insurance purposes.

Coordinate the identification and valuation of district property losses (land, land improvements, buildings, building improvements, machinery and equipment) at all school sites and offices for internal property claims.

Maintain real-time records of the district’s capital assets in accordance with the provisions of the California School Accounting Manual (CSAM) and the Government Accounting Standards Board (GASB) Statement 34.

Assist in the establishment and maintenance of policies and procedures for inventory control; analyze existing Fixed Assets practices, developing and implementing process improvements.

Coordinate physical inventory counting and observation of fixed assets in accordance with the requirements of California Education Code (State), the Office of Management and Budget (Federal), and OUSD Board Policy (District).

Work with District personnel in various departments to perform inventory observation, reconciling physical inventories to District records, and attaching identification tags or other identifying numbers to assets.

Coordinate with the Office of the Associate Superintendent for Facilitates Planning and Management to periodically reconcile the District’s portfolio of land, land improvements, buildings, building improvements, machinery and equipment, and works in progress.

Determine depreciation methods and useful lives of the fixed assets, maintains depreciation schedules with updates as needed.

Coordinate with the Office of the Controller to periodically report the book value of the District's full portfolio of capital assets and reconcile to accounting records.

Coordinate and monitor the internal and external redistribution of district assets declared surplus. This includes the preparation of a period surplus resolution for consideration by the Governing Board.

Provide operational and technical accounting thought leadership within the Fixed Assets domain.

Document, maintain records, and coordinate the receipt and distribution of equipment donated to the District.

Supervise, lead and coordinate Fixed Assets team, including the hiring, evaluation and development of staff.

Insurance Solutions:

Manage regular audits of the District's systems and records for employee health and welfare benefits and other insurance programs.

Represent the District in the collective bargaining process as it pertains to employee-related insurance programs, including health, welfare, and retirement benefits.

Represent the District on Health Benefits Governance Board (HBGB).

Serve as liaison, and otherwise manages relationships between, medical insurance carriers and the District.

Manage all fiscal aspects of the District's voluntary annuity program.

Maintain real-time data on the fiscal impact of health and welfare benefits programs.

Assure the complete reconciliation of insurance program payments and deductibles for health and welfare benefits.

Keep abreast of, and otherwise monitors, changes in laws, rules and regulations related to employee health and welfare benefits.

Analyze legislation and proposals related to employee health and welfare benefits and make comments and recommendations in connection with these and implements, from time to time, systems and procedures changes in response to changes in the law.

Provide cross-training to other staff within the department.

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:

California School Accounting Manual (CSAM)

Standardized Account Code Structure (SACS)

Generally Accepted Accounting Principles (GAAP)

Relevant statement of the Governmental Accounting Standards Board (GASB)

Computerized financial systems, preferably the Integrated Financial and Administrative Solution (IFAS)

Federal, State, and local laws and regulations governing employee benefits and property and liability insurance

Benefits administration processes and procedures

District collective bargaining law and labor agreements

California Education Code

Excellent oral and written and digital English communication skills

Microsoft Office Suite (Word, PowerPoint, Excel)

Basic standards of customer service

Good record-keeping techniques

Telephone techniques, systems, and etiquette

Interpersonal skills using tact, patience, and courtesy

Good communication skills and techniques

Diverse academic, socio-economic, cultural, ethnic, and disability backgrounds of District students and staff

Correct English usage, grammar, spelling, vocabulary, and punctuation

Computer software, hardware, and related technology

ABILITY TO:

Reconcile billing records to District records

Perform a variety of complex, technical duties in an assigned area involving specialized knowledge and independent judgment

Effectively resolve complex customer service complaints and problems, including the ability to professionally interact with difficult customers

Understand and interpret District and other rules, policies and procedures

Demonstrate excellent and effective written and spoken communication skills in English, including content, context, communication, conciseness, grammar and usage

Handle and defuse difficult situations while maintaining a calm and level-headed composure at all times

Work under pressure

Multi-task

Maintain the confidentiality of information

Maintain records; analyze situations and data accurately and take appropriate action

Work cooperatively with others and meet District standards of professional conduct

Work independently, with little direction

Supervise and evaluate the performance of assigned staff

Use a personal computer including word processing and spreadsheet programs.

Perform job responsibilities in a timely manner in order to meet scheduled deadlines

PREREQUISITES

Bachelor Degree or its equivalency required (2 years of similar and relevant work level experience = 1 year of college) in Business Administration, Public Administration, Finance, Management, Accounting, and Information and Decision Systems. A combination of experience and education may be used to meet the Bachelor Degree requirement; however, the work experience years used to qualify for the Bachelor Degree requirement cannot be used to meet the work requirement.

Five (5) years of increasingly responsible experience in benefits and benefit administration

Experience in governmental accounting and auditing; public accounting and auditing with knowledge of the standards of the California School Accounting Manual (CSAM), Standardized Account Code Structure (SACS), Generally Accepted Accounting Principles (GAAP); and relevant statement of the Governmental Accounting Standards Board (GASB)

Risk Management Professional certifications or partial completion of CEBS may be recognized

Experience in public school accounting systems preferred

Valid California Driver's License, if applicable

PRE-EMPLOYMENT PROCESS:

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

WORKING CONDITIONS

ENVIRONMENT:

Office and diverse school site environments; driving a vehicle to conduct work; fast-paced work; constant interruptions

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing, and pulling objects up to 30 pounds, occasionally 30+ pounds; bending and twisting at the waist, 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.

Legislative File	
File ID Number:	18-2673
Introduction Date:	1/9/2019
Enactment Number:	
Enactment Date:	
By:	



OAKLAND UNIFIED SCHOOL DISTRICT

Position Description

TITLE:	Specialist, Charter School Policy	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management
FLSA:	Exempt	WORK YEAR/HOURS:	261 days/7.5 hours
ISSUED:	Created: May 30, 2007 Revised: December 2018	SALARY GRADE:	ADCL 11

BASIC FUNCTION: Under direction of the assigned supervisor, handle all compliance issues related to the authorizing, oversight, renewal and closure of charter schools operating in Oakland Unified School District.

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 reflect the principal job elements accurately.)

ESSENTIAL FUNCTIONS:

Manage all compliance aspects of charter school oversight – including compliance with State and Federal regulations.

Manage the review of initial charter applications and renewal applications.

Manage the collection and analysis of all information required by district, state, and federal entities.

Develop tools for the collection and review of charter school information, e.g. demographics, teacher credentials, program focus.

Contribute to analyses regarding the location and target populations of new charter and non-charter district schools.

Manage relationships between charter schools and the district’s service areas.

Participate in the development of charter school Memorandum of Understanding (MOU’s) for district facilities and services.

Manage the MOU’s between the district and charter schools.

Participate in school-site visits.

Serve as a liaison between the charter office and the district’s service departments.

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 practices of effective compliance management
School systems, including familiarity with applicable state and federal laws
Compliance systems and the technical tools associated with these systems

ABILITY TO:

Collaborate with charter schools and OUSD departments
Work within a range of compliance systems
Interpret, apply and explain rules, regulations

PREREQUISITES

Any combination of education, training and/or experience equivalent to: a Bachelor's degree in education, business, or a related field and three years of increasing responsibility in a management or compliance field

An advanced degree is preferred
Experience with and detailed knowledge of school compliance systems preferred
Valid California Driver's License

PRE-EMPLOYMENT PROCESS:

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

WORKING CONDITIONS:

ENVIRONMENT:

Office and diverse school site environments; driving vehicle to conduct work, fast-paced work, constant interruptions.

PHYSICAL REQUIREMENTS:

Consistent mental alertness; sitting or standing for extended periods of time; lifting, carrying, pushing, and pulling objects up to 30 pounds, occasionally 30+ pounds; bending and twisting at the waist, 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.