

OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Superintendent of Schools

November 8, 2017

Legislative File	
File ID Number:	17-2265
Introduction Date:	11/08/2017
Enactment Number:	17-1593
Enactment Date:	11-8-17
By:	

TO: Board of Education

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

SUBJECT: Creation/Revision of Job Descriptions/Positions – Chief Financial Officer and Senior Manager, Construction

ACTION REQUESTED

Adoption by the Board of Education of Resolution No. 1718-0078 – creation/revision of job descriptions/positions – Chief Financial Officer and Senior Manager, Construction – for Departments, As Assigned.

DISCUSSION

- 1) The Office of the Superintendent proposes to revise an existing job description for the Chief Financial Officer role to reflect the current reporting structure as well update position eligibility requirements.

Revision:

Job Description/Position/Title/FTE:
Chief Financial Officer
(As Assigned) (1.0 FTE)

Salary Schedule/Range:

Salary Schedule: N/A; this role will be on an employment contract.
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

None.

- 2) The Division of Facilities Planning & Management consist of 3 Departments - Planning & Management, Maintenance and Custodial Services. Within the Facilities Planning & Management teams, there are two major working groups – the first group is the “pre-construction or program team” that manages the planning, design, and budget for various projects district-wide. The second group is “construction team” that manages all activities from start to finish once constructions has started. There is a need for a Senior Construction Manager role to coordinate and manage the existing construction projects and personnel and work towards reducing the nearly \$1.9M spent on consultant contracts.

Creation:

Job Description/Position/Title/FTE:
Senior Construction Manager
(As Assigned) (1.0 FTE)

Salary Schedule/Range:

Salary Schedule: CFCA
Range: 20: \$88,448.56 to \$112,871.30
12 months, 261 days, 7.5 hours (FT)

FISCAL IMPACT

For the purpose of building internal capacity and long term cost savings measures, this role is required in order to be successful with the implementation of construction projects district-wide.

RECOMMENDATION

Adoption by the Board of Education of Resolution No. 1718-0078 – creation/revision of job descriptions/positions – Chief Financial Officer and Senior Manager, Construction – Departments, As Assigned.

**RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
Resolution No. 1718-0078**

- Creation/Revision of Job Descriptions/Positions – Chief Financial Officer and Senior Manager,
Construction - Department, 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/revised as set forth in the attachments and shall be established on the respective salary schedule/range effective 12:01 a.m., November 9, 2017, as follows:

Revision:

Job Description/Position/Title/FTE:

Chief Financial Officer
(As Assigned) (1.0 FTE)

Salary Schedule/Range:

Salary Schedule: N/A; this role will be on an employment contract.
12 months, 261 days, 7.5 hours (FT)

Creation:

Job Description/Position/Title/FTE

Senior Construction Manager
(As Assigned) (1.0 FTE)

Salary Schedule/Range

Salary Schedule: CFCA
Range: 20: \$88,448.56 to \$112,871.30
12 months, 261 days, 7.5 hours (FT), and,

BE IT FURTHER RESOLVED, that the Board authorizes the new job classification as so stated above.

Passed by the following vote:

AYES: Jody London, Aimee Eng, Jumoke Hinton Hodge, Shanthi Gonzales, Vice President Nina Senn and President James Harris

NOES: None

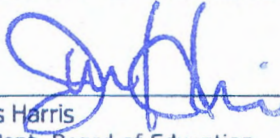
ABSTAINED: None

ABSENT: Roseann Torres

I 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 November 8, 2017.

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OAKLAND UNIFIED SCHOOL DISTRICT


James Harris
President, Board of Education


Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education

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OAKLAND UNIFIED SCHOOL DISTRICT

Position Description

TITLE:	Chief Financial Officer	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management Confidential
FLSA:	Exempt	WORK YEAR/HOURS:	261 days / 7.5 hours
ISSUED:	Created: May 2013 Revised: October 2017	SALARY GRADE:	Contract

BASIC FUNCTION: Direct, lead, plan, coordinate, supervise and evaluate the District's financial, compliance, fiscal aspects of risk management, accounting, and procurement and distribution, and is principal support to the Senior Administrative Leadership for Business Services; supervises, reviews and evaluates the directors and managers. Maintain confidentiality of all personnel matters; some duties will involve access to confidential information concerning employer-employee relations.

REPRESENTATIVE DUTIES: Develop Master Control Tools for budgeting, financial reporting; interim reports and unaudited actuals. Develop and direct economic forecasts and multiyear financial forecasts. Oversee the management of the budget development process, financial reports, audits, compliance reports, cash flow management, internal controls, workers' compensation utilization, employee benefits costs, procurement requirements, Redevelopment Agency revenues, and property and liability coverage. (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 reflect the principal job elements accurately.)

ESSENTIAL FUNCTIONS:

Plan, organize, lead, direct, evaluate and coordinate a variety of programs, projects and activities related to the financial functions including Budget, Accounting, Accountability & Compliance, fiscal aspects of Risk Management, Audit, and Procurement and Distribution.

Serve as the Chief Financial Officer for the District, implementing programs to assure the financial stability of the District and approving financial plans and budgets.

Direct and review the administration of financial activities via appropriate administrators and staff.

Formulate financial analysis, and provide financial data as required for District labor negotiations; assist in preparing and/or presenting the District's position in collective bargaining negotiations.

Direct the District's investment program and cash management; serve as the primary liaison with Alameda County and Alameda County Office of Education with regards to the District's investments and functions as the custodian of a variety of trust funds.

Prepare, administer, and control the annual general fund and all special fund budgets, coordinate and verify all student enrollment and attendance reports required by the State.

Provide technical expertise regarding assigned functions; formulate and develop policies and procedures.

Develop and implement long and short-term plans and activities for assigned areas and the District.

Provide advice and counsel to the Senior Administrative Leadership for Business Services, Board of Education and others on matters pertaining to assigned areas of responsibility.

Communicate with other administrators, District personnel and contractors to coordinate activities and programs, resolve issues and conflicts and exchange information.

Assist staff in budget development and administration when necessary, including maintenance of financial, position control, and functional supervision over financial management of student-body activities in all schools.

Establish and maintain internal control.

Oversee the District's claim, loss, and accident history, and identify methods to eliminate or minimize risks and possible losses.

Assist the Senior Administrative Leadership for Business Services in representing the Financial Services Division in meetings with administrative staff, the Board of Education and its standing committees.

Attend and actively participate in the Alameda County Office of Education's Chief Business Official Meeting.

Coordinate management information systems as it pertains to the financial, encumbering, accounting, human resources, position control, and payroll, budgeting functions of the District.

Centralize accounting for expenditures and property, expenditure forecasting, cash-flow management, investment of surplus funds, maintenance of official accounting records, and related functions.

Consult with and advise administrators regarding legal and procedural requirements of the school District's financial management.

Promote the establishment and maintenance of a partnership between educational programs and business services.

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

Attend meetings of the Board to present and assist with the interpretation of the financial condition of the District.

Perform related duties as required.

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:

Legal bases and sources of finances of California public education

Theory and practice of accounting, business administration, budgeting, auditing, payroll, position control, fiscal management and fiscal aspects of risk management with emphasis on governmental operations

Budget preparation and control

State laws, the California School Accounting Manual (CSAM), and Government Accounting Standards Board (GASB), Generally Accepted Accounting Principles (GAAP) and other regulations affecting school district financial affairs

Principles of organization, management, systems analysis, budgeting, staff development, communications and personnel administration

Concepts and applications of electronic data processing

Planning, organization and coordination needed for assigned program

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

Correct English usage, grammar, spelling, vocabulary and punctuation

Computer software, hardware, and related technology

ABILITY TO:

Formulate, organize and administer a wide variety of major organizational units involving business, finance, accounting, payroll, procurement and distribution and fiscal aspects of risk management

Supervise and evaluate staff from diverse backgrounds

Communicate effectively both orally and in writing

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

Analyze situations and complex financial data accurately and adopt an effective course of action

Work independently

Prepare comprehensive narrative and statistical reports

Maintain, through subordinates, the accuracy and currency of records and reports, while meeting regular and special demands for data

Operate personal computer, related software, and other office equipment

PREREQUISITES

A Bachelor's degree from an accredited college or university with a major in business administration, public administration or education with a specialization in school administration. Five to ten years of increasingly responsible management experience with a medium to large school district. Three to seven years of professional-level analytical or managerial experience, including at least five years of experience involving budget development and monitoring, payroll, position control, accounting, financial reporting, financial analysis, fiscal aspects of risk management, procurement and compliance.

Master's degree strongly preferred

Experience in medium size district of 5,000 or more students preferred

Valid California Driver's License

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:	Senior Manager, Construction	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	As Assigned	CLASSIFICATION:	Classified Management
FLSA:	Exempt	WORK YEAR/HOURS:	261 days/7.5 hours
ISSUED:	Created: October 2017	SALARY GRADE:	CFCA 20

BASIC FUNCTION: Under general direction organize and supervise activities for design and construction of school projects within the District. The Senior Construction Manager acts as liaison between the District, school site administrators, parents and staff, architects and contractors to assure the authorized projects are accomplished in accordance with approved policies and procedures; ensures that projects stay within budget, conform to established schedules and project modifications are carried out without delay.

The Senior Construction Manager must 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 reflect the principal job elements accurately.)

ESSENTIAL FUNCTIONS:

Plan, organize, direct and control all parts of school projects (K-12) from concept through design and construction to the closeout of project contracts.

Prepare and monitor project budgets, including support for obtaining funding.

Coordinate work of a multi-disciplinary development team across organizational boundaries, including design architects and construction professionals.

Coordinate hazmat abatement construction activities with District HazMat consultant.

Control project cost and schedule; review change orders aligned with District governance processes and policies.

Make presentations to the school sites to inform them of the project progress; ensure that contractors are maintaining safe work sites and that the needs of the students, teachers and administrative staff at the school sites are being protected.

Ensure timely DSA closeout of school projects by working with the architects, contractors, construction managers, inspectors, regulating authorities, and District Buildings and Grounds staff to resolve punch list items and other final activities.

Supervise, prepare, or participate in the design and production of final architectural contract documents for a wide variety of small construction and maintenance projects.

Plan, organize and direct the work of professional staff; analyze and solve problems; make judgment on all decisions; and deal effectively with government officials.

Schedule and budget capital projects; monitor and track project progress and expenditures and implement cost controls; use computer based project management systems; work effectively in a team environment; negotiate and resolve contract disputes; maintain client contractor relationships; and communicate effectively with the public, community groups, other District and City departments, agencies, and private contractors.

Maintain knowledge of laws and regulations affecting work scope including, but not limited to: Division of the State Architect (DSA); Americans with Disabilities Act Accessibilities Guidelines (ADAAG); and California accessibility requirements in Title 24 of California Code of Regulations, etc.

Oversee the planning, coordination and management of the construction of assigned school facilities' projects with school staff, architects and contractors; represent the assigned project in the absence of the construction project manager.

Confirm that appropriate and timely interim housing is provided for the impacted site when necessary.

Review value engineering plans and project cost estimates are remitted by project managers; serve as the second tier approver before the estimates go to final District approver in the current approval process.

Review and assess project scope documents and recommend changes when necessary.

Oversee the data entry and reporting relative to the facility master plan.

Serve as senior approver, when applicable for progress payments from contractors and architects.

Oversee the bidding of projects with the applicable District offices, i.e., Procurement, and serve as second-level approver for bid documents when necessary.

Attend and provide expertise to meetings with architects and school administrators involving planning issues for on-going and new projects.

Meet with regulatory agencies on state and local levels as necessary.

Oversee inspection of projects; manage project schedule; assuring timely completion of projects; and resolve issues and conflicts with project management staff, vendors, or others.

Report to senior District leadership on the status of project development/construction with other departments as necessary.

Serve as the senior District representative regarding issues that arise from inspectors, contractors, architects, engineers, and testing labs.

Ensure that all final plans and bid documents are remitted in a timely manner with all necessary technical and budgetary details are clear and complete.

Oversee pre-construction coordination meetings.

Review and approve reports related to construction project activities and reporting in accordance with applicable codes and regulations.

Review and verify submitted applications for payment and performs overall fiscal management of multiple construction projects.

Review and monitor overall administration of contracts for the architect and related consultants.

Supervise project close out and warranty activities.

Provide functional direction over areas of responsibility including construction project schedules, cost control, dispute resolution, contract administration, and quality control.

Supervise, evaluate and hold accountable the performance and professionalism of assigned staff; interview and select employees, and recommend transfers, reassignments, terminations, and disciplinary actions; plan, coordinate, and arrange for appropriate professional development opportunities for assigned staff.

Serve as project leadership in the absence of the construction project manager.

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:

Construction core competencies:

- Knowledge of construction technology
- Knowledge of Engineering, Procurement, and Construction (EPC) industry
- Constructability knowledge
- Knowledge of project budget process and tools
- Knowledge of department budget process and tools
- Knowledge of project controls
- Risk assessment/management

Technical aspects of architectural, civil, mechanical, electrical, structural and geotechnical engineering design and specifications; financing, estimating and budgeting, including planning and estimating, calculating overhead, design and construction costs

Various funding sources and restrictions; legal requirements for District projects; regulations and regulatory agencies and commissions affecting planning, zoning, design and construction; requirements of final bid packages; construction management techniques and practices

Architectural methods and techniques

Building Information Modeling (BIM) tools and capabilities and applications to District projects

Leadership in Energy and Environmental Design (LEED) rating systems

Research methods and report writing techniques

Federal, state, and District codes, regulations, policies and procedures related to assigned activities

Applicable sections of the State Education Code and other applicable laws

Methods to interpret, apply, and explain rules, regulations, policies and procedures

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

Interpersonal skills using tact, patience, and courtesy

Principles and practices of effective leadership

Presentation, communication, and public speaking techniques

Correct English usage, grammar, spelling, vocabulary and punctuation

Computer software, hardware, and related technology

ABILITY TO:

Effectively and appropriately manage large-scale project scope, budget, and timelines

Maintain current knowledge of technological advances in the field

Create and use BIM models throughout the construction building lifecycle phases

Apply knowledge of LEED requirements to inform District leadership of precertification and full certification options

Produce high quality work, including strong attention to detail

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

Communicate effectively in English orally and in writing

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

Maintain records and prepare reports

Prioritize and schedule work to meet schedules and deliverables

Work independently to plan, organize, and coordinate projects

Analyze situations accurately and adopt an effective course of action

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 engineering, architecture, construction management 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. A valid Certified Construction Manager (CCM) credential by the Construction Manager Certification Institute (CMCI) may be used to substitute for the degree requirement.

Twelve (12) years of construction experience and/or experience related disciplines, and nine (9) years of progressively responsible experience in school planning, design, and construction required

Experience in public school construction (K-12) preferred

Valid professional architectural or engineering license is required, i.e., Certificate of Registration as an Architect by the California Architects Board or Professional Engineer by the California State Board for Professional Engineers, Land Surveyors, and Geologists required

Valid California Driver's License

PRE-EMPLOYMENT PROCESS:

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

WORKING CONDITIONS

ENVIRONMENT:

Office and construction site environment; driving a vehicle to conduct work; reviewing project during demolition; working at heights

PHYSICAL REQUIREMENTS:

Climbing on ladders and scaffolding to inspect work; walking, bending, stooping and reaching to inspect projects; seeing to inspect work and to read; 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; 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.