CHIEF FINANCIAL OFFICER

Reports To: Superintendent
FLSA Status: Exempt
Compensation: Executive (Senior Staff Salary Schedule)

Position Overview

The Chief Financial Officer (CFO), a key member of the Superintendent's Core Leadership Team and Cabinet, is responsible for planning, organizing, directing and managing the District's financial and business operations to ensure fiscal integrity, efficiency, and the District's long-term financial well-being. The CFO provides strategic leadership in financial planning and forecasting, budgeting, accounting, procurement, internal controls, and compliance with applicable local, state, and federal laws and regulations, ensuring that financial resources and decisions are aligned with the District's educational goals and strategic priorities. Reporting directly to the superintendent, the CFO works collaboratively with the Superintendent's Core Leadership Team and Cabinet to plan and execute significant strategic and operational initiatives. The CFO leads and develops a high performing financial services team and advances modern, effective financial systems and processes with a commitment to excellent service and continuous improvement. As a District leader, the CFO also shares responsibility for identifying and addressing systemic barriers and helping create culturally responsive and equitable systems that support the success of every student.

Minimum Qualifications

Any combination of education, training, and experience that demonstrates the knowledge, skills, and abilities required to perform the duties of the position may be considered qualifying.

Education

- Bachelor's degree in accounting, finance, business administration, public administration or a related field

Experience

- Seven (7) years of progressively responsible leadership in Financial Management, Accounting, Business Administration, or a related area in a complex public or private sector organization
- Three (3) years in a senior administrative or leadership role with responsibility for multiple financial or business operational areas, including supervisory or management responsibility
- Experience collaborating with executive leaders, boards, and/or governing bodies on complex financial matters

Preferred Qualifications

- Knowledge of Oregon school finance, including the State School Fund, Oregon Local Budget Law, and applicable Oregon budgeting and financial reporting requirements
- Significant financial leadership experience in a public-school district, educational service district, governmental agency, or similarly complex public-sector or governmental organization
- Master's degree in accounting, finance, business administration, public administration or a related field
- CPA, SFO, CPFO, CGFM, CMA, or other advanced professional certification relevant to governmental or public-sector financial leadership
- Experience working or consulting in a complex organization with multiple represented/ unionized employee groups

Prerequisite Expectations

This position has the following expectations and prerequisite abilities.

1. Present self and 4J in a professional manner including: in oral and written communication, professional disposition when working with others and maintaining professional dress standards.
2. Demonstrated knowledge of Generally Accepted Accounting Principles (GAAP), governmental accounting and financial reporting standards, internal controls, budgeting, and financial management
3. Ability to effectively communicate, disseminate, and effectuate verbal or written communication and directives to a diverse group of administrators, staff, and the broader district community.
4. Maintain a high degree of professionalism, integrity, dependability and maintain a high level of confidentiality in accordance with FERPA and adherence to the competent and ethical educator practices.
5. Promotion of equity and diversity in all settings and processes and a commitment to anti-racists principles.
6. Maintain compliance with state and federal laws governing all aspects of our agency including ORS, OAR, IDEA, FOIA, and CIPA.

7. Exceptional prioritization of tasks, timely completion of work assignments, ability to take the initiative and work independently with minimal supervision.
8. Demonstrates respectful, flexible and effective teambuilding skills of cooperation, communication and active participation.
9. Ability to understand and follow oral and written directives, find requested data and present in user-friendly formats for internal and public distribution.
10. Maintain regular attendance at work. Be punctual in meeting deadlines, attending meetings, and following schedules.

**Work Environment – Office Environment – Active / Travel - Frequent*

<u>Essential Functions</u>

This is not necessarily an exhaustive or all-inclusive list of responsibilities, skills, and duties associated with this position. The supervisor of this position may modify this list at any time it's deemed necessary.

Executive Leadership: Financial Strategy & Guidance

1. Serve as a senior leader on the Core Leadership Team, contributing to districtwide policy development, strategic planning, district initiatives involving workforce planning, program expansion, significant funding changes, operational restructuring, and organizational leadership.
2. Serve as the primary District advisor and spokesperson on all financial matters, including the fiscal implications of policy decisions, collective bargaining agreements, legislative changes, significant investments, and operational initiatives. Respond to financial inquiries and sensitive issues from District leaders, schools, staff, community members, and other stakeholders in a timely, transparent, and professional manner.
3. Represent the District and maintain effective working relationships in financial matters involving auditors, rating agencies, state and federal agencies, financial institutions, and other external partners whose work affects District financial operations, funding, compliance, or long-term financial position.
4. Analyze complex financial information and scenarios to identify fiscal impacts, risks, and opportunities and provide actionable recommendations to the Superintendent, Leadership Teams, and Board of Directors, to support the District's financial sustainability and strategic direction.
5. Prepare and present clear, accurate, and accessible information about the District's financial position, budget, forecasts, risks, opportunities, and significant financial issues to the Board of Directors, Budget Committee, staff, families, community, and other stakeholders.
6. Develop, communicate and provide financial guidance, tools, training, and information to principals, directors, and other District leaders to strengthen budget literacy, financial stewardship, and operational decision-making that enables District leaders to effectively manage resources within their areas of responsibility.
7. Lead development of the District's long-range financial strategy, working collaboratively across departments to align financial planning with instructional priorities, enrollment trends, strategic initiatives, and organizational goals.
8. Lead continuous improvement and modernization of financial and business processes, workflows, systems, and service-delivery practices to increase efficiency, effectiveness, consistency, transparency, organizational capacity, and service to schools and departments.

Budgeting, Forecasting & Resource Allocation Management

1. Oversee and direct the development and administration of the annual budget, including timelines, financial assumptions, communication tools, and systems to ensure accuracy, transparency, consistency, and compliance with applicable requirements.
2. Lead the development of multi-year financial forecasts and financial models that incorporate enrollment, staffing, revenues, expenditures, legislative changes, collective bargaining commitments, and other financial assumptions.
3. Oversee implementation and ongoing monitoring of the adopted budget, including analysis of revenues, expenditures, variances, and emerging financial conditions, and recommend appropriate adjustments as needed.
4. Provide strategic leadership, develop and oversee resource allocation processes aligning financial resources and resource allocation decisions with the District's educational goals, instructional priorities, equity commitments, and strategic initiatives that support effective stewardship of District resources and implementation of established District priorities.

Financial Services Department Leadership

1. Provide executive leadership and direction for the District's financial services functions, building and sustaining a high-performing team characterized by clear expectations, accountability, collaboration, integrity, responsiveness, continuous improvement, and excellent service.
2. Lead, support, and develop financial services leaders and staff, promoting professional growth, effective supervision, strong performance, and organizational capacity.
3. Ensure appropriate organizational structures, roles, workflows, and staff capacity are in place to effectively carry out the District's financial responsibilities and priorities.

4. Build strong collaborative relationships across departments and schools to support effective financial planning, problem-solving, decision-making, and implementation of District priorities.

Financial Governance, Internal Controls, Audit & Compliance

1. Establish and maintain a districtwide financial governance framework that promotes strong fiscal stewardship, accountability, appropriate internal controls, risk mitigation, and the accuracy, integrity, and reliability of District financial operations and reporting.
2. Provide financial oversight of significant procurement decisions and ensure District procurement activities comply with applicable federal and state laws, regulations, Board policies, and District procedures.
3. Oversee all financial audit activity, including annual external audits, state and federal reviews, and assessments of internal financial controls.
4. Ensure timely and effective responses to audit findings and implementation of appropriate corrective action plans across departments.
5. Ensure compliance with applicable Oregon financial regulations, federal funding requirements, Board policies, and District financial policies and procedures.

Capital & Long-Term Financial Planning

1. Capital Finance & Infrastructure Planning
   a) Provide financial leadership and oversight for bond programs, capital construction, long-term maintenance planning, and capital reserves, ensuring alignment with the District's long-term financial strategy and priorities.
   b) Collaborate with Facilities and Operations leadership to integrate financial planning, analysis, and oversight into capital planning and project execution.
2. Bonds, Debt & Capital Reserves
   a) Oversee and monitor District debt obligations, including financial planning, reporting, compliance and their implications for the District's long-term financial position.
   b) Ensure compliance with applicable IRS spend-down rules, arbitrage requirements, bond reporting obligations, and other legal and regulatory requirements associated with District debt.

Accounting, Financial Reporting & Systems

1. Provide executive oversight of the District's accounting and financial reporting functions, ensuring the accuracy, integrity, timeliness, and transparency of financial information and reports.
2. Ensure financial records and reporting are maintained in accordance with Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB) standards, Oregon's Program Budgeting and Accounting Manual (PBAM), and applicable state and federal requirements.
3. Oversee the analysis and consolidation of financial data necessary to assess the District's financial position, identify trends and risks, support accurate forecasting, and inform financial and operational decision-making.
4. Ensure timely preparation of required financial statements, reports, and other financial information for District leadership, the Board, regulatory agencies, and other appropriate stakeholders.
5. Provide executive leadership for financial components of ERP modernization, financial system upgrades, and enterprise technology initiatives, working collaboratively with Technology and other departments to ensure systems effectively support District financial and business operations.
6. Ensure financial systems and data-management practices support accurate, timely, secure, and reliable financial information, reporting, analysis, and decision-making.

EMPLOYEE STATEMENT: "I hereby certify that I possess the physical and mental abilities to fulfill the essential functions of the above position with or without reasonable accommodation. If I require accommodation(s) in order to fulfill any or all of these essential functions, I agree to provide information to Eugene 4J on any accommodation required to perform a task."

EMPLOYEE/SUPERVISOR STATEMENT: "We certify that we have reviewed and discussed the above position description and understand its contents."

Employee Name (Please Print)	Employee Signature	Date
Supervisor Name (Please Print)	Supervisor Signature	Date