

FISCAL RESOURCES AND TRAINING MANAGER

DEFINITION

Plans, coordinates, supervises, and participates in the administration of training programs for a wide variety of fiscal activities pertaining to the budgetary matters and may manage student body functions.

TYPICAL DUTIES

Plans, coordinates, supervises, and implements a variety of training and staff development sessions regarding fiscal-related activities.

Develops and recommends training programs and materials.

Supervises and oversees the fiscal activities performed by the fiscal staff.

Plans, develops, writes, revises, and maintains program outlines, bulletins, memoranda, handbooks, and manuals for training purposes.

Provides one-on-one training to fiscal staff.

Acts as the central resource person and subject-matter expert in the field of school fiscal services.

Provides solutions and recommendations regarding fiscal issues concerning General Fund and special fund budgets that may include program, school, and local district financial activities, including budget control, position control, and systems analysis.

Advises employees and management personnel on fiscal problems and explains applicable regulations and procedures.

Administers personnel activities such as the maintenance of personnel records, processing of personnel transactions, and performance evaluation of classified employees.

Supervises and participates in the analysis of accounts.

Assures conformance with program guidelines; identifies overdrafts, under-utilized funds, and encumbrances; determines account status; and recommends adjustments to meet District needs.

Conducts and participates in a variety of analytical studies related to school, branch, local district, and program fiscal activities.

Compiles and analyzes data and prepares reports.

Develops, recommends, and participates in the implementation of changes in financial policies, procedures, reporting, and control systems.

Analyzes legislation to determine the effect on District or local district finances and programs.

Develops, revises, and directs the transmission of materials, such as procedure manuals, instructional memoranda, and bulletins regarding budget transfer, expenditure allocation, and other fiscal matters.

Supervises the preparation of budget related documents, maintenance of position control systems for school and office personnel, or the preparation of budget transfers and files maintenance.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Fiscal Resources and Training Manager plans, coordinates, and implements centralized training programs; supervises and manages fiscal staff; and may manage student body functions.

A Deputy Budget Director manages the Budget Services Branch that is responsible for preparing the District budget and establishing and maintaining school and local district budget control, or assists in managing the School Fiscal Services Division that is responsible for providing fiscal and business services to schools and monitoring student enrollment and attendance, student body activities, and non-categorical grant budgets.

A Fiscal Services Manager supervises and participates in budget preparation and modification, expenditure analysis, and budget adjustment for schools, administrative regions, programs, large branches, local districts, or the District.

SUPERVISION

General supervision is received from a Deputy Budget Director or other administrator. Supervision is exercised over lower-level technical and support employees.

CLASS QUALIFICATIONS

Knowledge of:

- Principles and practices of public administration, with emphasis on budget and fiscal affairs
- District budgetary practices and procedures
- Basic structure of District financial systems
- Financial practices, procedures, and methodology used at the school and program levels
- District organizational units and functions
- Financial regulations of regular and specially funded programs
- Basic application of data processing systems to budgetary records and reports
- Office methods, organization, and procedures
- Principles of supervision
- Principles and techniques of training

Ability to:

- Analyze complex budgets; fiscal controls, procedures, and systems; and financial legislation
- Use critical judgment in the evaluation of data and the development of clear, concise budget plans, procedures, training materials, and reports
- Plan work to meet deadlines
- Conduct and participate in meetings
- Supervise effectively
- Analyze training needs and develop appropriate training programs
- Conduct effective training sessions for individuals and in group sessions
- Present technical concepts and procedures clearly and concisely in oral and written communication
- Select and develop staff development training programs

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university with a bachelor's degree preferably in public or business administration, finance, or economics. Additional professional-level analytical or managerial experience beyond that required may be substituted for up to two years of the required education on a year-for-year basis.

Experience:

Five years of professional-level analytical or managerial experience, including three years of responsibility for financial analysis or District, program, or school-level budget control, and two years of training planning, developing, and implementation. A master's degree in business administration, public administration, or finance, may be substituted for up to one year of the required financial analysis experience.

Special:

A valid California Driver License.
Use of an automobile.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of a position at any time.

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