



Position Description

Chief Financial Officer

Salary Level: TBA

Prepared Date: November 21, 2022

Revised: September 4, 2025

Contract/Benefits: Based on Act 93 Agreement

Prepared by: Mr. Herman James, Chief of Talent Management & Labor Relations

Department or Area: Office of Financial Services

Approved By: Dr. Carol D. Birks, Superintendent

Reports To: Superintendent/Board of Directors

Qualifications:

- Bachelor's Degree in business administration/management, accounting or related field.
- Master's in Business Administration or CPA certification preferred.
- Minimum five years experience as a business manager or related role.
- Knowledge of current laws and regulations relating to public school accounting.
- Evidence of school and/or business leadership experience.
- Excellent communication skills.
- Executive Core Qualifications, including the ability to lead change and lead people, the ability to meet to meet District goals with a focus on results, the possession of business acumen, and the ability to build coalitions. Must be able to lead and manage, and to ensure that targeted goals and initiatives are achieved.
- Demonstrated skills in computer technology and financial / HR computer software applications.
- Satisfactory work record & criminal/child abuse clearances (Acts 34, 114 and 151).
- To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- Such additional or alternatives to the above qualifications as the Board and/or Superintendent may determine appropriate and acceptable.

Summary

Supervises system-wide business affairs, fiscal management, tax collection, procurement, budgetary development and related support functions while maintaining accurate and complete records of the District's financial affairs; The Business Manager works to ensure fiscal accountability and to maximize the use of human and financial resources through reallocation of overall resources; Collaborates with Human Resources to complement their functions for employees of the district.

Essential Duties and Responsibilities

- Supervises the accounting system necessary to provide school officials and administrators with accurate financial facts as the basis for formulating policies and decisions; provides the proper safeguards for custody of public funds.
- Performs pre-audit of internal procedures; determines that prepared statements present fairly the financial position, propriety, legality, and accuracy of financial transactions; proper recording of all financial transactions; post-audit procedures; external audits; reconciliation of internal and external audits; conducts internal reviews of student activities and petty cash funds in the District schools; monitors food service accounts.
- Develops procedures and policy on cash management and investments; develops cash projection report of revenues and expenditures of the general fund; selects the type and source of investments; secures proper collateralization of investments; maintains records and prepares monthly report of cash and investments; provides for full investment of all surplus funds.
- Holds responsibility for debt service and capital fund management. Performs long and short-term financing, including Tax Anticipation Notes (TANS); maturities and debt payments; long-range capital improvement programs; short-term debt management; debt service payment procedures and reports; investment of surplus capital funds; refunding of bond issues.
- Implements the School District's financial accounting system in accordance with "The Manual of Accounting and Related Financial Procedures for Pennsylvania School District, 1983"; translates the school budget into a business office accounting system; prepares the annual financial report of the
- District and other financial reports as required for submission to the State; prepares monthly financial reports to the Board of School Directors; interprets the annual audit report; supervises accounting procedures on payroll operation, accounts payable, trust and agency accounts, local, state and federal taxes, retirement, social security, insurance programs, capital reserve funds, student activity funds, and construction funds.
- Holds responsibility for financial planning and budgeting. Compiles and prepares the annual education budget; long-term fiscal planning; operating budget control; expenditure and revenue estimates; fiscal relationships with other governmental units; prepares monthly financial reports for the Board of School Directors.
- Administers Tax Sheltered Annuity 403(b) Plans for all employees.
- Holds responsibility for insurance and risk management. Performs review of insurance programs in collaboration with human resources; determines coverage to be provided; obtains insurable values on building and contents; files insurance claims and reports; directs insurance procurement procedures; maintains insurance policies and claim records; develops specifications and places insurance with companies, agents, and brokers.
- Supervises payroll operations for payment of all employees in accordance with negotiated contracts and Board policies; supervises completion of local, state, and federal reports on payroll deductions; has responsibility for establishing payroll policies and procedures; supervises proper accounting of all payroll disbursements; supervises and audits all payroll records.
- Acts as designated purchasing agent for the School District; processes purchase orders; recommends and enforces purchasing policies, procedures, and regulations; prepares specifications and determines quality of equipment and supplies; enforces school code requirements for bidding and purchasing; responsible for storage and delivery of supplies;

maintains inventory control; serves as the School District's expert on the source and cost of supplies, equipment, and services; maintains records and catalogues on items to be purchased.

- Holds responsibility for Real Estate and Fixed Asset Management. Maintains inventory records and determines values of fixed assets; secures adequate insurance and provides for security of fixed assets; responsible for management of real and personal property records.
- Reviews the tax collections of, and when necessary, provides input to the locally elected and appointed tax collectors for the District.
- Provides financial data for state and federal financial grants; provides assistance in securing financial grants; monitors District use of grant monies.
- Works collaboratively with the Deputy Superintendent and Director of Facilities to establish accountability for energy consumption and to establish a District energy management program for the reduction of utility consumption.
- Serves as the District's Record Retention Officer for non-educational records, the District's delegate to the Lehigh County Tax Collection Committee and the District's Right to Know Officer for information requests.
- Attends Board meetings and work sessions. Attends meetings and conferences as required by the position. Attends professional seminars and workshops.
- Serves as a member of the District's Emergency Management Plan Team.
- Serves as Board Secretary.
- Ensures proper adherence to District policy and procedures, and ensures proper adherence to applicable contract language that is in effect for the District.
- Provides increased fiscal oversight for Title I, Title II, ACCESS, and IDEA Federal funds.
- Performs any other duties assigned by the Superintendent.

Supervisory Responsibilities

Supervises secretarial staff and the coordinator of printing. Is responsible for the coordination and evaluation of these individuals. Responsibilities include interviewing, recommending for hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints, and resolving problems. Carries out supervisory responsibilities in accordance with the district's policies and applicable laws.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Interpersonal Skills

Parent and Community Relations

Manages difficult or emotional parent/community situations judiciously; Responds to parent/community requests for service and assistance; Solicits parent feedback to improve the effectiveness of the department; Meets commitments made to parents and the community.

Interpersonal Relations

Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Shows reasonable control of personal emotions; Exhibits objectivity and openness to the views of others.

Oral Communication

Speaks clearly and persuasively in positive or negative situations; Listens and solicits clarification; Responds appropriately to questions; Demonstrates group presentation skills.

Written Communication

Writes clearly and effectively; Edits work for spelling and grammar; Varies writing style to meet needs of the audience; Presents numerical data effectively.

Teamwork

Balances team and individual responsibilities; Gives and welcomes feedback; Contributes to building positive morale; Puts success of faculty, staff, and/or team above own interests and recognition; Able to build group commitment to goals and objectives.

Leadership Skills

Visionary Leadership

Provides vision and inspiration to peers and subordinates; Mobilizes others to fulfill the vision; Displays passion and optimism.

Change Management

Develops workable implementation plans; Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results.

Delegation

Delegates work assignments; Matches the responsibility to the person; Gives authority to work independently when appropriate; Sets expectations and monitors delegated activities; Provides recognition for results.

Leadership

Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others

Managing People

Includes faculty, staff, and/or team in planning and decision-making; Takes responsibility for the performance of faculty, staff, and/or team; Makes self accessible to faculty, staff, students, and/or team; Provides regular performance feedback to faculty, staff, and/or team; Develops the skills of faculty, staff, and/or team and encourages growth; Continually works to improve supervisory skills.

Quality Management

Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness; Fosters a focus on quality in others.

Analytical

Synthesizes complex or diverse information; Collects and analyzes data; Uses research, experience and intuition to complement data.

Safety and Security

Observes safety and security procedures when appropriate; Determines appropriate action beyond safety and security guidelines.

Problem Solving

Identifies and resolves problems in a timely manner; Gathers and analyzes facts relating to the problem skillfully; Develops alternative solutions; Works well in group problem-solving situations; Uses reason even when dealing with emotional topics.

Organizational Skills

Cost Management

Works within approved budget; Conserves district/school resources.

Diversity

Shows respect and sensitivity for cultural differences; Educates others on the value of diversity; Promotes a harassment-free environment; Assembles a diverse staff/team.

Organizational Support

Follows policies and procedures; Completes administrative tasks and reports correctly and on time; Supports district's goals and values.

Strategic Thinking

Develops strategies to achieve district's goals; Understands district's strengths & weaknesses; Aligns work with strategic goals; Adapts strategy to changing conditions.

Personal Competencies

Judgment

Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

Ethics

Treats people with respect; Keeps commitments; Inspires the trust of others; Works ethically and with integrity.

Motivation

Sets and achieves challenging personal goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals

Planning/Organizing

Prioritizes and plans work activities; Uses time efficiently; Sets daily/weekly goals and objectives.

Professionalism

Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect regardless of their status or position; Accepts responsibility for own actions.

Personal Quality

Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies supervisor feedback to improve performance; Monitors own work to ensure quality.

Dependability

Follows instructions, responds to supervisory direction; Takes responsibility for own actions; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan; Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.

Innovation

Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving instruction and related activities; Develops innovative approaches and ideas.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

While performing the duties of this job, the Manager is regularly required to talk or hear. The Manager is frequently required to walk, climb stairs, bend, and lift. The Manager is required to use hands to fingers or handle documents, telephone, etc. The Manager is occasionally required to stand; sit and reach with hands and arms. Specific vision abilities required by this job include close vision, distance vision, and ability to adjust focus.

Evaluation

The person filling this position will be evaluated according to the administrative evaluation procedure adopted by the Allentown School District.

Reviewed and read by: _____

Individual serving in this position

Date: _____