



EVANSTON/SKOKIE
SCHOOL DISTRICT 65

DIRECTOR OF FINANCIAL SERVICES

Situated on the shores of Lake Michigan and just north of Chicago, Evanston/Skokie School District 65 is a pre-K through 8th grade public school district serving approximately 6,500 students from the City of Evanston and a small neighboring section of the Village of Skokie. The district represents a wide range of ethnic, economic, racial, and cultural backgrounds and serves a community that not only supports but truly embraces public education. District 65 focuses on educating the “whole child” and is deeply committed to social and emotional learning as well as fostering a safe and supportive school climate for our students.

Department Summary:

The Financial Services department will ensure the long-term financial sustainability and stability of our school district by fostering fiscal responsibility, transparency, and strategic financial planning. This department is committed to managing the district’s financial resources efficiently and effectively to support the delivery of high quality education, maintain a safe and conducive learning environment, and promote the success and well-being of ALL students. The financial services team will take on the responsibility for developing systems and structures that enforce fiscal stewardship that aligns district goals and priorities to ensure optimal returns on investment (ROI) and understands the importance of being strong fiscal stewards of public tax dollars. This team is responsible for overseeing the financial operations of the district that includes, but is not limited to: financial planning, budgeting, purchasing, fiscal accounting, vendor contracts, fees, financial reporting, grants, insurance, payroll, accounts payable and receivable, etc.

The Director of Financial Services Department will be held accountable for the following responsibilities:

- In collaboration with the Chief Financial Officer/CSBO, ensures that all actions related to financial services align with Board policy, mission and vision statements, core values, and guiding principles in the Board’s strategic plan.
- Manage, coach, evaluate, and develop a team of five (5) from Grants, Purchasing, Accounts Payable, Accounts Receivable, Contracts, Compliance and a supervisory piece of Medicaid that applies to the Financial Services Collections and Claims Lead.
- Investigates and recommends innovative ways to accomplish financial activities within the District that are centered on continual improvement of systems, processes and structures.
- Directs the department’s accounting functions in accordance with the Governmental Accounting Standards Board (GASB), the accepted standards of the accounting profession, and the rules of the Illinois State Board of Education.
- Directs and ensures the timely month-end and year-end closing of all financial accounts.
- Facilitates the District’s year-end closing and audit activities by preparing required schedules and procedures to ensure the timeliness of closing the District’s financial records.
- Coordinates and supervises activities associated with the district’s annual audit.
- Serves as the primary contact for the district annual financial audit for grants, leads the single audit for federal grants and other state and federal agent (notified by the agency) grant audits and collaborates closely with Accounts Payable and Payroll staff as needed throughout the audit process.
- Approves, reviews, and monitors transactions for appropriate recording to general ledger accounts as needed.
- Reviews and approves all purchase orders and ePARs in IV for all grant funded programs.



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- Assists in managing current active grants including grant applications and amendments and identifies new funding opportunities successfully.
- Assigns duties, supervises and evaluates the Purchasing Agent and assists in managing the day-to-day operations of the district's purchasing protocols including problem solving with purchase orders, P-Card, vendor relations, budget issues and staff training needs.
- Assists the Chief Financial Officer/CSBO with budget preparation, including on-going monitoring and reporting, and ensuring that adequate grant funds are in alignment with grant budgets and agreements.
- Coordinates and supervises activities associated with the building and building contents appraisal for the purpose of insurance upgrades and annual statement of values.
- Assists in development of special and regular financial reports for submission to governmental agencies, the School Board and to the public.
- Implements special projects (e.g. internal auditing, exempt property reporting, ethics statements, etc.) for the purpose of complying with established regulatory guidelines and Board policies.
- Provides support for grant-reporting processes for the purpose of ensuring compliance with established financial, legal and/or administrative requirements.
- Oversees the entire grant management process including the financial supervision, new proposal applications, renewal applications, budget projections, budget reviews, budget amendments, award acceptance documentation, compliance with grant terms and regulations.
- Responsible for coordinating the preparation and submission of all mandatory expenditure and compliance reports by the established deadlines to secure adequate grant funding.
- Monitor and manage all grant budgets, ensure that funds are allocated within grant requirements and guidelines. Review, approve and process all budget amendments and journal entries.
- Support grant program directors, school administrators and support staff with grant budgets and expenditures. Provide guidance and recommendations to resolve issues related to grants.
- Track grant expenditures, perform bookkeeping for grant funds, and work closely with the Financial Services, Accounts Payable, Payroll, and grant program staff. Perform random audits periodically to verify district accounting internal control protocols are reinforced.
- Prepare the annual Tax Levy required documents for the Board and the County as needed.
- Supervises and represents the Financial Services Office in the absence of the Chief Financial Officer/CSBO for the purpose of ensuring efficient and effective functioning.
- Participates in school business related meetings as directed by the Chief Financial Officer/CSBO, (e.g. Finance Committee meetings, in-service training, workshops, etc.) for the purpose of conveying and/or gathering information required to perform job functions.
- Participates in job training and professional growth opportunities to enhance his or her ability to perform the essential functions of the job.
- The Director of Financial Services will perform other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the financial services work of this department along with other duties as assigned by the Chief Financial Officer/CSBO.

In order to be successful and achieve the above responsibilities, the Director of Financial Services must possess the following qualifications:

Education Required:

- Bachelor degree in finance or business or job-related area from an accredited college or university
- Master's degree preferred.



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Position Qualifications:

- Minimum of five (3) years of financial services experience
- Professional Educators License
 - CSBO Endorsement (preferred)

Knowledge, Skills, and Abilities:

- **Financial Acumen:** Strong understanding of financial principles, accounting practices, financial analysis, budgeting, forecasting, and financial reporting.
- **Leadership Skills:** Ability to lead and manage a team of financial professionals, set strategic direction, and drive financial performance.
- **Business Acumen:** Understanding of the organization's industry, market dynamics, competitors, and strategic goals to align financial strategies with overall business objectives.
- **Risk Management:** Ability to identify, assess, and mitigate financial risks, develop risk management strategies, and ensure compliance with regulations and internal policies.
- **Strategic Planning:** Experience in developing financial strategies, long-term financial plans, and budgets to support the organization's growth and profitability goals.
- **Communication Skills:** Strong written and verbal communication skills to effectively communicate financial information to stakeholders, present financial reports, and collaborate with other departments.
- **Analytical Skills:** Proficiency in financial analysis, data interpretation, and problem-solving to make informed financial decisions and recommendations.
- **Decision-Making:** Ability to make sound financial decisions, prioritize initiatives, and allocate resources effectively to drive financial performance and achieve organizational objectives.
- **Change Management:** Skill in driving financial process improvements, implementing financial systems, and leading change initiatives to enhance financial operations and efficiencies.
- **Interpersonal Skills:** Ability to build relationships, collaborate cross-functionally, and work effectively with internal and external stakeholders, such as investors, auditors, and regulatory authorities.
- **Ethical Conduct:** Commitment to upholding high ethical standards, integrity, and transparency in financial practices and decision-making.
- **Continuous Learning:** Willingness to stay updated on industry trends, regulations, and best practices in financial services to adapt to changing business environments and drive innovation.

This position requires traveling to various school sites, work locations, and/or community organizations throughout the district.

SUPERVISORY EXPECTATIONS: Manage & evaluate assigned direct reports in the Financial Services Department and their subordinates professional work. Take responsibility for the overall direction, coordination, and evaluation of assigned teams. Carry out supervisory responsibilities in accordance with the district's strategic goals and policies applicable to state and federal laws. Responsibilities include interviewing, hiring,



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and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

DISTRICT EXPECTATIONS: All employees are expected to demonstrate regular and predictable attendance; to support the District's vision, mission, goals, and Strategic Plan; to engage in civility, respect, professionalism, and collaborative teaming; and to maintain the professional knowledge and skills necessary to perform the essential duties and responsibilities of their positions.

NOTE: School Board Policy ensures equal opportunity for all in its personnel policies and practices and does not discriminate on the basis of race, color, gender, religion, national origin, marital status, sexual orientation, gender preference, political beliefs, social/family background, disability or age.

PHYSICAL DEMANDS:

Physical Activities: Standing, walking, sitting, handling, keyboarding, talking, and hearing

Lifting Demands: Up to 35 pounds

Reaching Activities: Both dominant and non-dominant hand; overhead.

Environmental Conditions: Noise Intensity 3 moderate