

PINELLAS COUNTY SCHOOL DISTRICT, FLORIDA

PCSB: 8050
Pay Grade: ~~E07~~ E08

FLSA: Exempt
PTS

BUDGET SPECIALIST MANAGER, BUDGET, FTE & COST REPORTING

REPORTS TO:

Executive Director, Budget and Resource Allocation

SUPERVISES:

~~Not Applicable~~ Financial Reporting Analyst
Budget Assistant
Budget Assistant II
FTE Assistant

QUALIFICATIONS:

A bachelor's degree from an accredited college or university in accounting or business administration with special course emphasis in accounting plus four (4) years experience in activities directly related to the area of assignment. In addition, the incumbent must possess four (4) years' administrative/supervisory experience. Demonstrated working knowledge of accounting principles and financial expertise. Demonstrated proficiency in the use of Microsoft Office Suite.

PREFERRED:

CPA. Administrative or supervisory experience in Florida school budgeting, including capital budgeting.

MAJOR FUNCTION

Manages the resource allocation procedures, processes, and activities relating to projections, budgetary control, fiscal and impact analysis, monitoring and reporting for assigned areas of responsibility. Manages the FTE processes and procedures. Manages the cost reporting processes and procedures.

ESSENTIAL RESPONSIBILITIES

- ~~Responsible for supervising~~ Supervises procedures, processes and activities related to assigned areas of responsibility in the areas of Budget, FTE, and Cost Reporting Capital Outlay
- ~~Responsible for assisting~~ Assists in the preparation and maintenance of all budgets relating to assigned areas of responsibility
- ~~Responsible for conducting~~ Supervises budget and financial analyses, preparing related reports, and providing technical assistance to school, department and program staffs on budget and resource allocation matters in assigned areas of responsibility
- Manages reporting, compliance and monitoring procedures, processes and activities in assigned areas of responsibility, for meeting requirements of the Florida Department of Education, the Superintendent and School Board
- Responsible for submitting the annual budget to the Florida Department of Education and Department of Revenue
- Oversees the preparation of the monthly budget amendment and related agenda item for presentation to the School Board
- ~~Responsible for assisting~~ Assists in other areas of budgeting and resource allocation, as assigned
- Assists in managing the district's personnel position control system
- Serves as FTE administrator for the district
- ~~Responsible for~~ Oversees FTE forecasting; data collection, analysis, and compliance and auditing procedures, processes, and activities in order to maximize revenue and minimize FTE audit findings
- Supervises analysis of FTE survey reporting data to estimate related financial impact
- Research FTE and cost reporting topics and issues to evaluate compliance requirements and potential financial implications on district operations

BUDGET SPECIALIST MANAGER, BUDGET, FTE & COST REPORTING

ESSENTIAL RESPONSIBILITIES (Continued)

- Manages cost reporting and cost analysis processes and activities to include required state cost and comparability reporting and district program cost analyses
- Coordinates class size compliance monitoring processes during FTE surveys
- Serves as coordinator between the district and outside entities (e.g. Charter Schools)
- Assists in the development, analysis and monitoring of school, department and program staffing models
- Manages the preparation, monitoring and reporting of school, department, special center and capital budgets
- Responsible for the preparation of the district's five-year Capital Outlay plan
- ~~Responsible for~~ Supervises the implementation and maintenance of budgetary systems for projects
- ~~Responsible for~~ Oversees the maintenance and control of all scheduled and unscheduled project budgets
- Attends meetings of the Florida professional associations that provide training and legislative information when appropriate or sends a designee
- Coordinates activities between TIS and Budget Department
- Performs other related work as required

TERMS OF EMPLOYMENT

Salary and benefits shall be paid consistent with the district's approved compensation plan. Length of the work year and hours of employment shall be established by the District.

Performance of the job will be evaluated in accordance with provisions of the School Board's policy on evaluation of personnel.

The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities and duties required of those in this classification.

HISTORY OF JOB CLASSIFICATION

ISSUED: 4/93 BMP; BOARD APPROVED: 4/28/93; D & R Rev. 11/96 PBL; REVISED (MQ's): 10/98 PBL; BOARD APPROVED: 10/13/98; REVISED D&R, MQ's: 2/19 RAS; BOARD APPROVED: 3/09/10; REVISED FORMAT, SALARY SCHEDULE, QUALS, PREF, ER, ADA, 8/12 LM; BOARD APPROVED: 9/25/12; REVISED TITLE, PG, SUPERVISES, MF, ER 1/16 CH; BOARD APPROVED:

BUDGET SPECIALIST MANAGER, BUDGET, FTE & COST REPORTING

WORKING CONDITIONS & PHYSICAL EFFORT:	Seldom Or Never	Monthly	Weekly	Daily	Hourly
1. Lift objects weighing up to 20 pounds		X			
2. Lift objects weighing 21 to 50 pounds	X				
3. Lift objects weighing 51 to 100 pounds	X				
4. Lift objects weighing more than 100 pounds	X				
5. Carry objects weighing up to 20 pounds	X				
6. Carry objects weighing 21 to 50 pounds	X				
7. Carry objects weighing 51 to 100 pounds	X				
8. Carry objects weighing 100 pounds or more	X				
9. Standing up to one hour at a time	X				
10. Standing up to two hours at a time	X				
11. Standing for more than two hours at a time	X				
12. Stooping and bending		X			
13. Ability to reach and grasp objects				X	
14. Manual dexterity or fine motor skills					X
15. Color vision, the ability to identify and distinguish colors				X	
16. Ability to communicate orally					X
17. Ability to hear					X
18. Pushing or pulling carts or other such objects	X				
19. Proofreading and checking documents for accuracy					X
20. Using a computer to enter and transform words or data					X
21. Using various technology tools					X
22. Working in a normal office environment with few physical discomforts					X
23. Working in an area that is somewhat uncomfortable due to drafts, noise, temperature variation, or other conditions	X				
24. Working in an area that is very uncomfortable due to extreme temperature, noise levels, or other conditions	X				
25. Working with equipment or performing procedures where carelessness would probably result in minor cuts, bruises or muscle pulls	X				
26. Operating automobile, vehicle, or van	X				
27. Other physical, mental or visual ability required by the job	X				

Budget Specialist Manager, Budget, FTE & Cost Reporting – PTS

PINELLAS COUNTY SCHOOL DISTRICT, FLORIDA

PCSB:
Pay Grade: E06

FLSA: Exempt
PTS

SENIOR FINANCIAL REPORTING ANALYST
REPORTS TO: Executive Director, Budget & Resource Allocation
SUPERVISES: Not Applicable
QUALIFICATIONS: Graduation from an accredited college or university with a bachelor's degree in Accounting, Finance or Business Administration with a major in Accounting/Finance. Five (5) years progressively responsible work experience in accounting and financial reporting and database mining utilizing MS Access, SQL, or other related software.
PREFERRED: Experience in public school finance or governmental accounting. Must have a considerable amount of knowledge regarding the principles and practices of governmental accounting/budgeting management and analysis. Demonstrated computer skills with emphasis on report writing, database management, and financial software such as MS Access and Excel. Demonstrated ability in analysis, reporting, methods, and procedures for assigned functional area.
MAJOR FUNCTION
Performs highly complex and advanced, specialized, professional, analytical work involving the gathering, compiling, and data mining of financial data and interpreting and translating into meaningful information for management decision-making purposes. Also serves as a mentor to district Financial Reporting Analysts to aide in their professional development.
ESSENTIAL RESPONSIBILITIES
<ul style="list-style-type: none">• Examines techniques for validity and utilizes proven methods in estimating and identifying expenditures in terms of cost centers and programs; prepares and analyzes related cost accounting reports• Applies knowledge of current accounting practices, procedures and principles in analyzing, interpreting, translating, and communicating with full disclosure the financial position and results of financial operations of related funds and account groups; prepares and submits corresponding financial reports• Facilitates management's control of financial operations and funds by preparing, analyzing, and interpreting appropriate financial statements and reports• Utilizes state chart of accounts in the preparation of revenue and expenditure statements and reports by fund• Analyzes, interprets, translates, and communicates information contained in both monthly and annual financial statements; identifies and communicates financial trends and related future fiscal impacts• Develops information and reports for management's use in financial decision-making• Supports district finance division with complex report development and analysis• Requires a solid working knowledge of software and database systems used in financial reporting such as MS Access and MS Excel• Responsible for conducting budget and financial analyses, preparing related reports, and providing technical assistance to school, department and program staff on budget and resource allocation matters in assigned area of responsibility• Creates and maintains unit allocation database for area superintendents• Mentors district Financial Reporting Analysts to aide in their professional growth• Develops, prepares, and monitors the district's budget plans• Projects, analyzes, and prepares district salary budgets• Provides budget analysis reports for administration and departments• Develops, prepares and analyzes documents for Public Hearings and Annual Budget Summary publications

SENIOR FINANCIAL REPORTING ANALYST

ESSENTIAL RESPONSIBILITIES (Continued)

- Aligns district budget with Comprehensive Annual Budget Model
- Develops reports for analysis and distribution of Position Control information
- Liaison with TIS for Position Control and Budget modules in TERMS
- Researches budget anomalies and makes recommendations and adjustments
- Develops ad hoc reports as requested
- Performs other related duties as required

TERMS OF EMPLOYMENT

Salary and benefits shall be paid consistent with the district's approved compensation plan. Length of the work year and hours of employment shall be established by the District.

Performance of the job will be evaluated in accordance with provisions of the School Board's policy on evaluation of personnel.

The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities and duties required of those in this classification.

HISTORY OF JOB CLASSIFICATION

ISSUED: 1/16 CH; BOARD APPROVED:

SENIOR FINANCIAL REPORTING ANALYST

WORKING CONDITIONS & PHYSICAL EFFORT:	Seldom Or Never	Monthly	Weekly	Daily	Hourly
1. Lift objects weighing up to 20 pounds	X				
2. Lift objects weighing 21 to 50 pounds	X				
3. Lift objects weighing 51 to 100 pounds	X				
4. Lift objects weighing more than 100 pounds	X				
5. Carry objects weighing up to 20 pounds	X				
6. Carry objects weighing 21 to 50 pounds	X				
7. Carry objects weighing 51 to 100 pounds	X				
8. Carry objects weighing 100 pounds or more	X				
9. Standing up to one hour at a time	X				
10. Lift objects weighing up to 20 pounds	X				
11. Standing for more than two hours at a time	X				
12. Stooping and bending		X			
13. Ability to reach and grasp objects				X	
14. Manual dexterity or fine motor skills					X
15. Color vision, the ability to identify and distinguish colors				X	
16. Ability to communicate orally					X
17. Ability to hear					X
18. Pushing or pulling carts or other such objects	X				
19. Proofreading and checking documents for accuracy					X
20. Using a keyboard to enter and transform words or data					X
21. Using a video display terminal					X
22. Working in a normal office environment with few physical discomforts					X
23. Working in an area that is somewhat uncomfortable due to drafts, noise, temperature variation, or other conditions	X				
24. Working in an area that is very uncomfortable due to extreme temperature, noise levels, or other conditions	X				
25. Working with equipment or performing procedures where carelessness would probably result in minor cuts, bruises or muscle pulls	X				
26. Operating automobile, vehicle, or van	X				
27. Other physical, mental or visual ability required by the job	X				

Senior Financial Reporting Analyst - PTS

PINELLAS COUNTY SCHOOL DISTRICT, FLORIDA

PCSB: 8300
Pay Grade: ~~C05~~ E05

FLSA: Exempt
PTS

<u>GENERAL MANAGER, PLANNING SPECIALIST</u>
REPORTS TO: Director, Student Demographics, Assignment and School Capacity
SUPERVISES: Not Applicable
QUALIFICATIONS: Master's Bachelor's degree from an accredited college or university <u>in Education, Business, or a related field</u> , certification in Educational Administration, Education Leadership, Administration and/or Supervision, or a related field. Five (5) years of related experience. in managerial roles. Demonstrates a broad knowledge of the district's demographic composite <u>composition</u> and a comprehensive knowledge of the district as a whole; competencies in mathematical computations, map reading , technological applications, and statistical research. <u>the duties of district Data Management Technicians.</u>
PREFERRED: <u>Demonstrated knowledge of the Student Reservation System, district curriculum programs, including ESE, ELL, alternative education, and parental choice/application programs.</u>
MAJOR FUNCTION
The Planning Specialist works under the supervision of the Director of Student Assignment. The General Manager, Planning's Specialist's primary role aligns to the following tasks within the Student Assignment department: assisting in the planning and developing of school attendance boundaries, <u>school capacities, parental choice/application programs, enrollment projections and trends regarding the use of facilities, plant surveys,</u> and the aggregation and analysis of data related to these tasks.
ESSENTIAL RESPONSIBILITIES
<ul style="list-style-type: none">• Works with customer service representatives (CSR) in providing timely and accurate information to internal and external stakeholders• <u>Serves as Student Assignment Office liaison to Transportation Department</u>• <u>Assists in the monitoring of the district's compliance with class size legislation.</u>• Provides required information needed for making school zones and boundaries recommendations• Assists in the preparation of post desegregation, Choice, and unitary status information for the School Board, courts, and media• Assists with the development and placement of parental choice/application programs• Assists with developing and maintaining zone grid maps for the district and individual schools• Aggregates data for school plant surveys• Assists with all Florida Inventory of School Houses (F.I.S.H.) updates as required by FLDOE• Assists with the development of school program capacities• Assists in the preparation of enrollment projections• Provides statistical analyses of data relating to all components of Student Assignment• Assists with monitoring demographic trends within the district• Monitors out-of-zone <u>exceptions</u>, special attendance permit (SAP), and professional courtesy processes and <u>parental choice</u> assignments• Performs <u>other</u> related work as required

GENERAL MANAGER, PLANNING SPECIALIST

TERMS OF EMPLOYMENT

Salary and benefits shall be paid consistent with the district's approved compensation plan. Length of the work year and hours of employment shall be established by the District.

Performance of the job will be evaluated in accordance with provisions of the School Board's policy on evaluation of personnel.

The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities and duties required of those in this classification.

HISTORY OF JOB CLASSIFICATION

ISSUED: 3/82; TITLE BOARD APPROVED: 4/9/86; FORMAT REVISED: 7/88; REVISED: D & R ONLY 4/95 PBL; REVISED (MQ's): 10/98 PBL; BOARD APPROVED: 10/13/98; REVISED MF, D&R and MQ's 5/10 LMCK; BOARD APPROVED: 5/25/2010; REVISED FORMAT, TITLE, SALARY SCHEDULE, MQ, MF, ER, ADA, CH 1/12/16; BOARD APPROVED:

GENERAL MANAGER, PLANNING SPECIALIST

WORKING CONDITIONS & PHYSICAL EFFORT:	Seldom Or Never	Monthly	Weekly	Daily	Hourly
1. Lift objects weighing up to 20 pounds	X				
2. Lift objects weighing 21 to 50 pounds	X				
3. Lift objects weighing 51 to 100 pounds	X				
4. Lift objects weighing more than 100 pounds	X				
5. Carry objects weighing up to 20 pounds	X				
6. Carry objects weighing 21 to 50 pounds	X				
7. Carry objects weighing 51 to 100 pounds	X				
8. Carry objects weighing 100 pounds or more	X				
9. Standing up to one hour at a time				X	
10. Standing up to two hours at a time				X	
11. Standing for more than two hours at a time	X				
12. Stooping and bending	X				
13. Ability to reach and grasp objects				X	
14. Manual dexterity or fine motor skills					X
15. Color vision, the ability to identify and distinguish colors				X	
16. Ability to communicate orally					X
17. Ability to hear					X
18. Pushing or pulling carts or other such objects	X				
19. Proofreading and checking documents for accuracy					X
20. Using a keyboard to enter and transform words or data					X
21. Using a video display terminal					X
22. Working in a normal office environment with few physical discomforts					X
23. Working in an area that is somewhat uncomfortable due to drafts, noise, temperature variation, or other conditions	X				
24. Working in an area that is very uncomfortable due to extreme temperature, noise levels, or other conditions	X				
25. Working with equipment or performing procedures where carelessness would probably result in minor cuts, bruises or muscle pulls	X				
26. Operating automobile, vehicle, or van	X				
27. Other physical, mental or visual ability required by the job	X				

General Manager, Planning Specialist - PTS

PINELLAS COUNTY SCHOOL DISTRICT, FLORIDA

PCSB: 7285
Pay Grade: E04

FLSA: Exempt
PTS

SENIOR PROFESSIONAL DEVELOPMENT COORDINATOR
REPORTS TO: Director, Professional Development
SUPERVISES: Not applicable
QUALIFICATIONS: Bachelor's degree from an accredited college or university and five (5) years of progressively responsible related professional and/or educational experience. Demonstrated experience in organizing and coordinating programs or processes. Demonstrated awareness of contemporary trends and programs in professional development. PREFERRED: Master's degree with Florida Certification in Educational Leadership, or an equivalent certification as defined by the Florida Department of Education. Knowledge and expertise in adult learning theory.
MAJOR FUNCTION
The Senior Professional Development Specialist is responsible for developing, implementing, monitoring, and facilitating districtwide professional development activities while ensuring alignment with the district's mission.
ESSENTIAL RESPONSIBILITIES
<ul style="list-style-type: none">• Assists the Director, Professional Development and the Specialist, Professional Development in coordination and alignment of the work of the Professional Development Department• Designs and conducts training for district- or school-based personnel targeted to districtwide initiatives• Collaborates with staff and other stakeholders to design and facilitate professional development instruction that promotes best practices and meets district and state requirements• Builds capacity with district and school staff to provide ongoing, job-embedded professional development• Plan, implement, and evaluate professional development and a change in practice with ongoing monitoring, including observation, feedback, and reflection• Explores and implements professional development that is based on research-based strategies to help identify areas in need of improvement• Supports development, training, and implementation of evaluation system• Performs other related duties as required
TERMS OF EMPLOYMENT
<i>Salary and benefits shall be paid consistent with the district's approved compensation plan. Length of the work year and hours of employment shall be established by the District.</i> <i>Performance of the job will be evaluated in accordance with provisions of the School Board's policy on evaluation of personnel.</i> <i>The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities and duties required of those in this classification.</i>

SENIOR PROFESSIONAL DEVELOPMENT COORDINATOR

HISTORY OF JOB CLASSIFICATION

ISSUED: 6/00 PBL; BOARD APPROVED: 6/13/00; REVISED PREFERRED: 8/05 AK; REVISED MF, D&R, PREFERRED: 7/06 AK; REVISED MF, D&R: 1/07 AK; REVISED FORMAT, TITLE, SALARY SCHEDULE, MF, ER, ADA, 2/13 LM; BOARD APPROVED: 4/09/13; REVISED TITLE, REPORTS TO, MQ, MF, ER, 1/16 CH; BOARD APPROVED: 04/09/13; REVISED/ISSUED BASED ON FADSS STUDY 1/16 CH; BOARD APPROVED:

SENIOR PROFESSIONAL DEVELOPMENT COORDINATOR

WORKING CONDITIONS & PHYSICAL EFFORT:	Seldom Or Never	Monthly	Weekly	Daily	Hourly
1. Lift objects weighing up to 20 pounds		X			
2. Lift objects weighing 21 to 50 pounds	X				
3. Lift objects weighing 51 to 100 pounds	X				
4. Lift objects weighing more than 100 pounds	X				
5. Carry objects weighing up to 20 pounds		X			
6. Carry objects weighing 21 to 50 pounds	X				
7. Carry objects weighing 51 to 100 pounds	X				
8. Carry objects weighing 100 pounds or more	X				
9. Standing up to one hour at a time			X		
10. Standing up to two hours at a time	X				
11. Standing for more than two hours at a time	X				
12. Stooping and bending		X			
13. Ability to reach and grasp objects				X	
14. Manual dexterity or fine motor skills					X
15. Color vision, the ability to identify and distinguish colors				X	
16. Ability to communicate orally					X
17. Ability to hear					X
18. Pushing or pulling carts or other such objects	X				
19. Proofreading and checking documents for accuracy					X
20. Using a computer to enter and transform words or data					X
21. Using various technology tools					X
22. Working in a normal office environment with few physical discomforts					X
23. Working in an area that is somewhat uncomfortable due to drafts, noise, temperature variation, or other conditions	X				
24. Working in an area that is very uncomfortable due to extreme temperature, noise levels, or other conditions	X				
25. Working with equipment or performing procedures where carelessness would probably result in minor cuts, bruises or muscle pulls	X				
26. Operating automobile, vehicle, or van	X				
27. Other physical, mental or visual ability required by the job	X				

Senior Professional Development Coordinator – PTS