

**SAN RAMON VALLEY UNIFIED SCHOOL DISTRICT**  
**Position Description**

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<b>TITLE:</b>	Business Manager	<b>REPORTS TO:</b>	Assigned Supervisor
<b>DEPARTMENT:</b>	Business Services	<b>CLASSIFICATION:</b>	Classified Management
<b>FLSA:</b>	Exempt	<b>WORK YEAR:</b>	12 Months
<b>BOARD APPROVAL:</b>	November 19, 2019	<b>SALARY:</b>	Management Tier IV; Range G

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**SUMMARY DEFINITION:**

Plan, organize, control, and direct a variety of Business Department functions for the District including: coordinate and participate in the accurate and timely preparation of all phases of the District auditing and accounting functions; provide technical guidance to accounting staff; file federal, state, and county reports; coordinate the establishment of internal controls and monitor compliance with federal, state and county audit requirements; centralized procurement of supplies, materials, and equipment; supervise and evaluate the performance of assigned personnel.

**REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)**

**E = Essential Functions**

Perform, plan, organize, coordinate and participate in the accurate and timely preparation of all phases of District auditing and accounting functions; file federal, state, and county reports; coordinate the establishment of internal controls and monitor compliance with federal, state and county audit requirements. **E**

Perform duties and responsibilities necessary to close the books at the end of each fiscal year. **E**

Maintain strict control over expenditures and ensure fiscal accountability. **E**

Work directly with the District's external auditor. **E**

Examine accounting records, reports, and audits to determine compliance with rules and procedures. **E**

Plan, organize, control, and direct a variety of programs, projects, and activities related to the purchasing functions of the District including the procurement of supplies, materials, equipment, and services. **E**

Prepare, direct, and control the preparation of requests for proposal, requests for qualifications, specifications, bids and quotations. **E**

Analyze bids or quotes, check references, and recommend awarding of various contracts. **E**

Develop, prepare, and control the annual budget for the purchasing team; analyze and review budgetary and financial data; monitor and authorize expenditures in accordance with established guidelines; assist with District budget development and projections. **E**

Supervise and evaluate the performance of assigned staff; interview and select employees and recommend transfers, reassignment, and disciplinary action. **E**

Provide technical resources for staff members in existing and new processes, procedures, and computer software programs and respond to questions or concerns regarding interpretation of laws, rules, regulations and contracts governing District accounting. **E**

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Work effectively with other District departments, school sites, and outside agencies to obtain and verify information pertinent to accounting functions. **E**

Train and assist school site personnel in appropriate procedures for Revolving Cash Funds, Student Body Funds, and external funding from parent and community organizations. **E**

Audit computerized accounting data and procedures for efficiency and accuracy. **E**

Write and edit complex reports and present findings, conclusions and recommendations. **E**

Reconcile and maintain the general ledger. **E**

Formulate and develop policies and procedures; review methods and procedures to determine effectiveness; assure quality control; recommend and initiate cost-effective procurement strategies and services to District departments and school sites. **E**

Provide a positive climate for interaction and communication among District personnel. **E**

Communicate with other administrators, District personnel, vendors and contractors to coordinate activities and programs; resolve issues, conflicts and exchange information; conduct inquiries; analyze prices and market trends. **E**

Develop and implement short and long-range plans and activities. **E**

Write comprehensive, objective and statistical reports; make presentations to a wide variety of audiences. **E**

Attend workshops and meetings related to District policies and purchasing processes and procedures. **E**

Coordinate and direct the disposal of District property. **E**

Direct record keeping activities related to purchasing activities. **E**

Operate a computer, related software, and contemporary office equipment. **E**

Maintain current knowledge of State of California Education Code, Board Policies and Administrative Regulations, and other laws, legislation, rules and procedures related to purchasing in a school district environment. **E**

Perform related duties as assigned.

### **MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The qualifications listed in this document are the minimum qualifications required in order to successfully be considered and hired for the position.

### **EDUCATION AND EXPERIENCE:**

Any combination of education and experience equivalent to: Three (3) years of increasingly responsible experience functioning in a lead capacity in a public sector business department and/or purchasing operation; Bachelor's degree in business or related field; three years of management or supervisory experience; managing, supervising and evaluating employees, and purchasing experience, preferably in a public agency setting.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

**KNOWLEDGE, SKILLS, AND ABILITIES:** The requirements listed below are representative of the knowledge, skill, and/or ability required.

**KNOWLEDGE OF:**

Policies and procedures involved in the preparation, verification, maintenance, and processing of District accounting and auditing processes.

Principles of accounting and financial record-keeping. District organization, operations, policies and objectives. District and County accounting and auditing procedures.

Applicable sections of State Education Code and other applicable laws. Financial and statistical record-keeping techniques.

Planning, organizing and directing purchasing functions of the District.

Methods, practices, and procedures for purchasing.

Sources of supply, commodity markets, marketing practices and commodity pricing methods and differentials.

Requirements and restrictions of purchasing procedures in a school district.

Computers, spreadsheets and word processing programs.

Budget preparation and control.

Management and personnel practices and principles.

Technical aspects of field of specialty.

Interpersonal skills using tact, patience and courtesy.

Training techniques.

Verbal and written communication skills.

Data collection, analytical methods and procedures.

Report writing and record-keeping techniques.

**ABILITY TO:**

Meet District standards of professional attitude as outlined in the Code of Ethics for Management Employees.

Plan, organize, and administer the purchasing, warehousing, and duplicating functions of the District.

Interpret market prices and trends.

Plan and schedule purchasing activities for optimum efficiency and service.

Maintain current knowledge of State of California Education Code, and other purchasing rules and regulations.

Plan, organize, and coordinate purchasing projects and development of bid specifications.

Perform research, analyze data, and produce a variety of reports.

Read, understand, explain, and implement purchasing policies and procedures.

Conceptualize and work at detail level.

Use appropriate judgment in diverse situations.

Train personnel on purchasing procedures and programs.

Work cooperatively and communicate effectively.

Prepare comprehensive technical materials.

Prepare and present complete and accurate written and oral reports.

Establish and maintain cooperative and effective working relationships with others.

Work independently with little direction.

Prioritize, plan, organize, and schedule work.

Give and receive oral and written instructions using proper English.

**TECHNOLOGY EQUIPMENT AND TOOL SKILLS:**

Proficient ability to use a personal computer and use Proficient ability to use a personal computer and use Microsoft Office XP or higher, databases specific to the District, Internet, and Microsoft Outlook. Ability to

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use telephone, facsimile machine, copy machine, printers, scanning devices, calculator and general office equipment. Applicable knowledge of computer software programs for data storage and retrieval, web page/menu information, word processing, spreadsheets, scheduling and calendar management, data management and complex calculations.

**LANGUAGE SKILLS:**

Ability to read, write, and speak in English. Ability to read and interpret documents such as operating and maintenance instructions and procedure manuals, including policies, procedures, and equipment manuals; to write routine draft instructions, reports and correspondence; to speak effectively one-one and/or before internal and/or external groups.

**PHYSICAL DEMANDS & WORK ENVIRONMENT:** The physical demands and the work environment characteristics described here are representative of those that an employee encounters while performing the essential functions of this job, and must be met by the employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**WORKING CONDITIONS:**

Office and school site environment; driving a vehicle to conduct work.

**PHYSICAL ABILITIES:**

Dexterity of hands and fingers to operate a computer keyboard and other department related tools and equipment; seeing to read; prepare and proofread documents, bids, quotes and related documents and view computer monitors; hearing and speaking to exchange information in person, on the telephone, and to make presentations; lifting moderately heavy objects; sitting or standing for extended periods of time; kneeling, bending at the waist and reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies.

**ADMINISTRATIVE REVIEW**  
*Keith J. Rogenski*

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Keith Rogenski  
Assistant Superintendent, Human Resources

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Date *12/2/19*

*W Schmitt*

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Rick Schmitt  
Superintendent

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Date *11/22/19*