



**Job Title:** Chief Financial Officer

**Department:** Superintendent's Office

**Reports To:** Superintendent

**Grade:** XG-05

**Number of Days:** 12 Months

**Security Access:** Education Service Center

**Last Revised Date:** April 5, 2016

**Overtime Status:** Exempt

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**Mission and Vision:** Tulsa Public Schools is the destination for extraordinary educators who work with our community and families to ignite the joy of learning and prepare every student for the greatest success in college, careers and life. Our mission is to inspire and prepare every student to love learning, achieve ambitious goals and make positive contributions to our world.

**Core Values:** Our core values guide how we work and interact with each other at every level of the organization. We embrace and embody these values every day:

- **Equity:** All children deserve the opportunity to develop their full academic and social potential. Our diversity is a community treasure, and we must foster an inclusive environment by examining biases and resolving unfair practices.
- **Character:** We are honest, trustworthy and have high standards of behavior. We do the right thing even when it is hard. While we do not always agree, we treat one another with kindness and respect.
- **Excellence:** We work hard together and expect a lot of one another because high standards produce exemplary knowledge, skills, abilities and mindsets.
- **Team:** We care for one another, support the personal and professional development of one another, and work together to improve our community
- **Joy:** Joy at school and at work makes us more productive, because when we create, innovate and imagine, our motivation grows. We want to ensure that everyone knows the excitement that comes from working deeply on a problem, task or concept and experiencing breakthrough moments.

**Position Summary:** The Chief Financial Officer (CFO) is responsible for maintaining and improving the financial systems and procedures that will enable TPS to fulfill its vision. Key areas of focus include collaborating with the district leadership team on strategic financial planning, analysis and business modeling, leading and managing the finance team to create processes and procedures which empower schools and not encumber them, and overseeing the finance team and its management of financial transactions including accounts payable and

receivable, banking, payroll, procurement, and grants. Additionally, the CFO assures the ethical and prudent conduct of the District's fiscal affairs in a manner that complies with all applicable laws and that represents a high degree of efficiency, effectiveness and transparency. The CFO is also responsible for developing and fostering positive working relationships with school, district, state, federal and community agencies.

**Minimum Qualifications:**

**Education:**

- Bachelor's degree in accounting, finance or business administration; Master's degree preferred

**Experience:**

- Minimum of five years of significant work experience with organizations (budgets exceeding \$20M) as a CFO, Director of Finance, Comptroller or equivalent with non-profit or education organizations strongly preferred
- Minimum of ten years of budgeting and finance experience with experience in school districts preferred

**Other:**

- Innovative, forward thinker with a demonstrated competency in strategic thinking and leadership

**Responsibilities and Essential Functions:** The following duties are representative of performance expectations. A reasonable accommodation may be made to enable a qualified individual with a disability to perform essential functions.

- Develop the strategic vision and direction for the financial services team with a focus on strategically using resources to support the goals and priorities of Destination Excellence
- Manage the development of an annual budget, budget projections for strategic planning, as well as separate budgets for each school and department including related amendments, reports and presentations
- Maintain comprehensive understanding of TPS annual reports, including operating budget, capital expenditures and annual payroll
- Review and analyze monthly income statement, balance sheet, cash flow and budget vs. actual variance report for all schools and departments
- Perform ongoing analysis and develop replicable processes and systems that ensure TPS' financial health
- Strategize ways in which TPS can improve fiscal efficiency and effectiveness, including researching and implementing solutions to better support budget management
- Collaborate with the leadership team on strategic financial planning, analysis and business modeling
- Lead and support schools, leaders and relevant staff through the student-based budgeting process; ensure appropriate processes, resources and training are included in this work
- Work with external auditor to ensure clean financial audits
- Responsible for the effective, efficient and compliant operation of the following divisions encompassed within the Finance Department:
  - Bond projects
  - Budgeting
  - Federal programs (grants) and special projects

- Payroll
- Treasury/cash management
- Accounting/accounts receivable, accounts payable, bank reconciliations and other bookkeeping tasks
- Procurement and materials management
- Maintain and update fiscal calendar for all reporting deadlines including, but not limited to, audit schedule, tax reporting, initiation of annual budget process and monthly close dates
- Demonstrate a record of data-driven decision making and fiscal responsibility to sustain continuous improvement
- Establish a performance-based culture that establishes effective management systems to support exemplary programs and high-quality teaching and learning
- Analyze the results of revenue forecasts and revenue monitoring data to inform leadership and initiate appropriate solutions to the data indicators
- Recruit, retain, lead and motivate a high performing leadership team
- Establish and monitor district procedures and guidelines to ensure full compliance with federal and state statues and requirements for the efficient operation of the entire Finance Department
- Maintain positive, cooperative, and mutually supportive relationships with the administration, instructional staff, students, parents, and representatives of resource agencies within the community
- Maintain a cutting-edge awareness of the promising practices and innovations in finance programs and policies that are emerging locally and nationwide and help bring these practices to TPS
- Display ability to work collaboratively with others on a team
- Perform other tasks, duties, or services consistent with this position as assigned

**Skills and Abilities Required:** The following characteristics and physical skills are important for the successful performance of assigned duties.

*Specific Knowledge and Expertise:*

- Ability to monitor and evaluate budgets, financial trends and forecasts
- Knowledge of federal and state laws governing education finance
- Comprehensive understanding of how to develop financial models for both growth opportunities and financial shortfalls
- Ability to lead a culture of collaboration and achievement
- Strong analytic, performance management, accountability, and systems-thinking orientation necessary to inform strategy development and execution
- Extreme flexibility, with a strong work ethic and an entrepreneurial spirit to accommodate high level of responsibility and multiple priorities
- Ability to work effectively in a fluid environment with a wide range of constituents including Board members, school personnel, District leadership and others
- Proven ability to lead a finance or related department/division.

*Empathy and commitment to cause:*

- Deep understanding of the urban school system environment and commitment to improving student achievement
- Ability to manage conflict with an emphasis upon finding solutions which advance the priorities of the District
- Passionately believes that all students can achieve at high levels
- Demonstrate cultural competence and a deep understanding of and empathy for issues facing urban families

*Communication, interpersonal and team skills:*

- Ability to be a team player, to coach, coordinate and lead teams as well to collaborate vertically and horizontally across the organization
- Strong verbal and written communication skills
- Outstanding organizational skills and high attention to detail
- Build consensus and resolve conflicts; exhibit willingness to have difficult conversations

*Problem solving and systems thinking:*

- Innovative, forward thinker with a demonstrated competency in strategic thinking and leadership
- Takes initiative to solve problems and create stakeholder buy-in
- Identify and prioritize mission critical issues with alignment of people, time and resources
- Offer innovative solutions to seemingly intractable problems
- Exhibits strong focus on goals and results; sets clear metrics for success
- Thrive in achievement-oriented and fast-paced environment
- Remove barriers or obstacles that make it difficult for staff to achieve their goals and ensures that staff have the resources they need to succeed

*Leadership skills:*

- Motivate, inspire, and move other adults to action to achieve ambitious goals
- Skilled at re-envisioning, building, and managing a team, especially in a time of growth and change; excellent at identifying talent and taking advantage of each person's skills and contribution to team effort
- Build coalitions and work collaboratively with diverse stakeholders at all levels, including but not limited to district personnel, students, families, communities, and/or the Education Board

**Supervisory Responsibility:**

- Directly supervise the Director of Accounting, Executive Director of Bond Projects/Energy Management, Director of Budget, Executive Director of Federal Programs & Special Projects, Director of Finance/Treasurer, Director of Materials Management and the Director of Payroll

**Working Conditions:** Exposure to the following situations may range from rare to frequent based on circumstances and factors that may not be predictable.

- Standard office environment

- Subject to stress caused by a changing environment, complexity of the organization, tight deadlines and heavy workload
- Must be flexible in order to attend events and meetings outside of regular work hours

*Tulsa Public Schools is committed to building a diverse and inclusive team of individuals who contribute to the district's mission with their talents, skills and energy. Tulsa Public Schools is an equal opportunity employer and does not discriminate on the basis of race, religion, color, national origin, sex, sexual orientation, gender expression, gender identity, pregnancy, disability, genetic information, veteran status, marital status, age or any other classification protected by applicable law.*

*Tulsa Public Schools also provides reasonable accommodations to qualified applicants and employees with disabilities. If you need an accommodation during the application process, please contact the district's Talent Management department at 918-746-6310, or the district's Human Rights and Title IX Coordinator at 918-746-6517. You can also direct your request for accommodation in writing to the Tulsa Public Schools Education Service Center, Attn: Talent Management, 3027 S. New Haven Ave., Tulsa, OK 74114-6131.*