



SPECIAL PERSONNEL COMMISSION MEETING AGENDA

March 26, 2025

A special meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Wednesday, March 26, 2025**, at **12:30 p.m.**, in the **District Administrative Offices**: 1717 4th Street, Santa Monica, CA.

I. General Functions:

- G.01 Call to Order
- G.02 Roll Call
- G.03 Pledge of Allegiance
- G.04 Approval of Agenda for Regular Meeting on March 26, 2025

| Commissioner | M | S | | Yes | No | Abstain | ABSENT |
|-----------------|---|---|--|-----|----|---------|--------|
| Lauren Robinson | | | | | | | |
| Mahshid Tarazi | | | | | | | |
| Phillip Tate | | | | | | | |

- G.05 Public Comments



SPECIAL PERSONNEL COMMISSION MEETING AGENDA

Electronically Recorded (AUDIO ONLY)

March 26, 2025

PERSONNEL COMMISSIONERS:

Mrs. Lauren Robinson, Mrs. Mahshid Tarazi, and Mr. Phillip Tate

A special meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Wednesday, March 26, 2025**, at **12:30 p.m.**, in the **District Administrative Offices**: 1717 4th Street, Santa Monica, CA.

Note About Parking: Parking for those visiting the new district office is located in the multi-structure parking lot located at 333 Civic Center Dr., Santa Monica.

- ❖ **Instructions on Public Comments:** Persons wishing to address the Personnel Commission regarding an item scheduled for this meeting must submit the "Request to Address" card before consideration of that item. Persons wishing to address the Personnel Commission regarding an item within the Commissions subject matter jurisdiction but not scheduled on this meeting's agenda may speak during the Public Comments section by submitting the "Request to Address" card before the Commission reaches that section of the agenda.

OPEN SESSION

I. GENERAL FUNCTIONS:

G.01 Call to Order:

G.02 Roll Call:

G.03 Pledge of Allegiance:

G.04 Approval of Agenda for Special Meeting on March 26, 2025

G.05 Public Comments:

Public Comments is the time when members of the audience may address the Personnel Commission on items not scheduled on the meeting's agenda. All speakers are limited to five (5) minutes. When there is a large number of speakers, the Personnel Commission may reduce the allotted time to three (3) minutes per

If you will require an accommodation to participate in the Commission meeting, please notify the Personnel Commission Office at least 48 hours prior to the meeting.

speaker. The Brown Act (Government Code) states that Personnel Commission members may not engage in discussion of issues raised during “Public Comments” except to ask clarifying questions, make a brief announcement, make a brief report on his or her own activities, or to refer the matter to staff.

II. ACTION ITEMS:

These items are presented for ACTION at this time.

A.01 Classification Revision:
Director – Fiscal and Business Services

III. NEXT REGULAR PERSONNEL COMMISSION MEETING:

Wednesday, April 23, 2025, at 4:30 p.m. – *District Office Board Room*

IV. ADJOURNMENT:

There being no further business to come before the Personnel Commission, it is recommended that the meeting be adjourned.

Submitted by:

Joshua Kahn
Secretary to the Personnel Commission
Director, Classified Personnel

If you wish to receive a full copy of the Personnel Commission Agenda Packet, please contact the Personnel Commission Office at (310) 450-8338, ext. 70-279.

II. Action Items:

| Commissioner | M | S | | Yes | No | Abstain | ABSENT |
|-----------------|---|---|--|-----|----|---------|--------|
| Lauren Robinson | | | | | | | |
| Mahshid Tarazi | | | | | | | |
| Phillip Tate | | | | | | | |



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

PERSONNEL COMMISSION

Special Meeting: Wednesday, March 26, 2025

AGENDA ITEM NO: II.A.01

Classification Specification Revision: Director – Fiscal and Business Services

BACKGROUND INFORMATION:

This classification will have an upcoming vacancy and the classification specification was reviewed for potential revisions in anticipation of recruitment.

METHODOLOGY:

Staff conducted the following activities:

- Met with the current Director – Fiscal and Business Services, Mr. Gerardo Cruz, and Assistant Superintendent, Human Resources, Dr. Douglas Meza, to discuss changes to the minimum qualifications and additional anticipated revisions
- Met with Mr. Cruz to follow up and provide a comprehensive revision for review and incorporate feedback

ANALYSIS & FINDINGS:

Based on the information gathered, the recommended changes are summarized as follows:

- Revise title formatting for consistency
- Revise Basic Function for consistency and include supervision
- Revise Education for consistency
- Revise Experience to increase previous level of responsibility required while reducing the years required
- Revise Additional Requirements/Information for consistency
- Revise Duties for clarity and consistency
- Revise Supervision for clarity and consistency
- Revise Knowledge for clarity, consistency, and remove redundancies
- Replace Abilities with Core Competencies
- Revise Working Conditions for consistency

DIRECTOR'S RECOMMENDATION:

The Director of Classified Personnel recommends that the Personnel Commission approve the revisions to the Director – Fiscal and Business Services classification specification as provided.

| Commissioner | M | S | | Yes | No | Abstain | ABSENT |
|-----------------|---|---|--|-----|----|---------|--------|
| Lauren Robinson | | | | | | | |
| Mahshid Tarazi | | | | | | | |
| Phillip Tate | | | | | | | |



CLASSIFICATION DESCRIPTION

BARGAINING UNIT: Non-Represented

CLASS CODE: 510919

SALARY RANGE: M-68

DIRECTOR₁—FISCAL AND BUSINESS SERVICES

BASIC FUNCTION:

Under the general direction administrative direction, of the Assistant Superintendent of Business and Fiscal Services plans, organizes and directs the budget development processing, attendance accounting, fiscal accounting, payroll, and internal control activities and functions of the District—while also supervising and evaluating the performance of assigned staff.

MINIMUM QUALIFICATIONS

EDUCATION:

Graduation from college with a bachelor's degree in accounting, business administration, or related field. A CPA certificate is desired. Bachelor's degree in accounting, finance, business administration, or other field closely related to the duties and responsibilities of the position from an institution of higher learning accredited by a regional accreditation association, as recognized by the Council for Higher Education Accreditation. Foreign degrees and credit units require translation and equivalency established by an agency recognized by the Commission on Teacher Credentialing.

EXPERIENCE:

Five (5) years of increasingly responsible professional experience in business management, accounting and budget analysis, including at least three (3) years in a supervisory capacity. Experience within a K-12 school district is preferred. Three (3) years of experience managing a fiscal unit within a public agency and supervising the work of others. Supervisory experience may be, but need not be, acquired concurrently.

LICENSES AND OTHER REQUIREMENTS: ADDITIONAL REQUIREMENTS/INFORMATION:

Valid Class C driver license and use of a personal automobile.

A valid California Driver License and the availability of private transportation or the ability to obtain transportation between job sites is required. Possession of a certificate in school business management is highly desirable.

REPRESENTATIVE DUTIES:

- Provides leadership and direction and assumes management responsibility for the Fiscal and Business Services Department and activities including accounting, budgeting, and payroll. Develops, implements, and evaluates goals and objectives for department of Fiscal and Business Services
- Plans, organizes and directs a variety of activities and functions related to Fiscal Services including District budget processing, payroll, attendance accounting, fiscal accounting, cafeteria accounting, special projects accounting, and other fiscal programs; develops and implements procedures for internal control for various District programs; serves as an administrative

financial officer for the District. **Directs and coordinates staff in the collection, processing, monitoring, tracking, and reconciling of accounting, budgeting, and payroll data**

- Assists the Assistant Superintendent of Business and Fiscal Services in the planning and preparation of the District's annual budget.
- Analyzes and resolves issues related to attendance accounting, fiscal accounting, payroll, and accounts receivable. **Investigates, reconciles, and reports on discrepancies in budgets, revenues, and expenditures**
- Provides prior and current year data from accounting records for the budgetary process; translates budget into controls for accounting systems to regulate financial stability. **Consults with District leadership to advise on department level budget deliberations**
- Supervises **Directs** and participates in the annual closing of the accounting books.
- Provides for systems of internal control of various District fiscal programs including special internal audits as directed. **Serves as liaison between District and external fiscal reporting agencies by providing requested material and addressing questions related to adherence of laws, rules, regulations, and procedures**
- Directs and participates in the selection, training, utilization and evaluation of staff; motivates and counsels staff; develops subordinate supervisors by pushing authority downward and outward throughout the department; work with staff members to develop and improve upon skills and abilities. **Establishes goals, objectives, and productivity standards for staff**
- **Selects, trains, evaluates, and supervises staff**
- Establishes practices and controls for safe and efficient handling of District and student body funds, and financial and property records; establish reporting procedures of financial transactions. **Develops, directs, implements, and evaluates District-wide procedures for collecting, processing, monitoring, tracking, and reconciling fiscal data**
- Directs the planning and organization of fiscal accounting and payroll systems. **Collaborates with other departments and outside agencies to define fiscal reporting system specifications and conduct system testing to ensure specifications are met**
- **Initiates, plans, directs and evaluates the implementation of enterprise financial management systems**
- Provides needed business services for specially-funded educational programs in such areas as application preparation, budgeting, analysis, procurement, implementation and reimbursement.
- Acts as the primary financial advisor to the Assistant Superintendent of Business and Fiscal Services, providing technical expertise, information and assistance to maintain fiscal solvency and budget control; conducts financial or statistical research or analytical studies to assist administration and the Board of Education in the formulation of policies and planning of new or revised programs; presents reports to the Board and other interested groups. **Provides support and guidance to District staff by identifying and investigating errors, answering questions, and providing guidance on meeting requirements**
- Assumes a participating role on the District's financial committees. **Attends, participates, and represents the District's interests at a variety of functions including, but not limited to, executive cabinet, conferences, hearings, public meetings, workshops, and committees**
- Prepares or directs the preparation and maintenance of a variety of financial, attendance, narrative and statistical reports, records and files related to assigned activities and personnel; review and sign District warrants. **Directs and prepares financial statements, projections, analyses, studies, and other related reports for District use and county, state, and/or federal reporting requirements**
- Communicates positively and effectively with other administrators, District personnel and contractors to coordinate activities and programs, to resolve issues and conflicts by finding alternative solutions to problems and to exchange information; answers questions and provides information on complex accounting questions; collaborates, informs, supports, and serves as a resource to executive management staff on various fiscal and business related matters.

- Develops and prepares the annual preliminary budget for Fiscal Services; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations; reviews and verifies fund balances.
- Operates a computer and other office equipment in the preparation of correspondence, records, and reports.
- Attends and conducts a variety of meetings as assigned; prepares and presents reports for Board meetings related to the financial administration of the District as required.
- Assumes responsibility for special assignments as directed and acts for the Assistant Superintendent of Business and Fiscal Services in his/her absence.
- **Develops and revises user guides, manuals, and related fiscal reporting documents**
- **Composes and distributes information bulletins and other communications to District staff related to new and/or revised laws, regulations, processes, and procedures**
- **Plans, coordinates, and conducts presentations, workshops, committees, and trainings related to fiscal services for staff, board members, and external stakeholders**
- **Reviews and audits various fiscal data, records, and reports for accuracy to ensure compliance with legal and procedural requirements**
- Perform related duties as assigned or as the situation requires.

NOTE: The statements listed above are intended to describe the general nature and level of work being performed by employees in this classification, and are not to be interpreted as an exhaustive list of responsibilities and qualifications required of personnel so classified. Reasonable accommodations will be made so that qualified employees can perform the essential functions of the job.

SUPERVISION:

Supervision **Administrative direction** is received from the Assistant Superintendent of Business and **Fiscal Services**. **Supervision is exercised over management and office, technical, and business service staff.**

Supervision is exercised over Fiscal Services staff. Supervision of additional Business Services departments may be assigned by the Assistant Superintendent of Business and Fiscal Services.

KNOWLEDGE AND ABILITIES JOB REQUIREMENTS

KNOWLEDGE OF:

- ~~Generally accepted accounting principles (GAAP).~~
- ~~Governmental accounting procedures.~~
- ~~California School Accounting Manual (CSAM).~~
- ~~Planning, organization, and direction of the Fiscal Services of the District.~~
- ~~Education codes, Merit rules, labor and other applicable laws, rules and regulations related to assigned functions.~~
- ~~Principles and methods of modern public and business administration management.~~
- ~~Techniques, practices and principles of school attendance accounting and fiscal accounting and payroll.~~
- ~~Auditing principles and practices.~~
- ~~Financial analysis and research procedures.~~
- ~~Budget preparation and control.~~
- ~~Automated and computerized financial systems in use in the District.~~
- ~~Oral communication skills.~~
- ~~Written communication skills.~~
- ~~Principles and practices of administration, supervision and training.~~
- ~~Interpersonal skills using tact, patience and courtesy.~~

- Principles and practices of accounting, auditing, and financial forecasting within a public agency, including generally accepted accounting principles (GAAP)
- Principles and practices of budget development and management within a public agency, including the California School Accounting Manual (CSAM)
- Principles and practices of financial analysis, research, and statistical measurement
- Principles of public policy development and the legislative process
- Federal, state and local laws pertaining to accounting practices, procedures, and reporting requirements within a public agency
- Principles, practices, terminology, and trends of enterprise financial management systems
- Principles and practices of recordkeeping and maintaining documentation
- Principles and terminology of employment laws, codes, and regulations
- Principles and practices of employee supervision and evaluation

ABILITY TO:

- ~~Plan, organize, and administer the Fiscal Services of the District.~~
- ~~Analyze and resolve issues related to accounting, payroll, or accounts receivable.~~
- ~~Supervise and evaluate the performance of assigned staff.~~
- ~~Develop staff training programs.~~
- ~~Communicate effectively both orally and in writing.~~
- ~~Interpret, apply, and explain rules, regulations, policies and procedures.~~
- ~~Establish and maintain cooperative and effective working relationships with others.~~
- ~~Operate a computer and assigned office equipment.~~
- ~~Analyze situations accurately and adopt an effective course of action.~~
- ~~Meet schedules and time lines.~~
- ~~Work independently with little direction.~~
- ~~Speak in front of large groups.~~
- ~~Manage group processes.~~
- ~~Manage conflict.~~
- ~~Plan and organize work.~~
- ~~Prepare comprehensive narrative and statistical reports.~~
- ~~Direct the maintenance of a variety of reports and files related to assigned activities.~~

CORE COMPETENCIES:

- Allocating Resources – Prioritizing the use of fiscal and material resources to maximize organizational effectiveness
- Analyzing & Interpreting Data - Drawing meaning and conclusions from quantitative or qualitative data
- Attention to Detail – Focusing on details of work content, work steps, and final work products
- Business Process Analysis – Defining, assessing, and improving operational processes and workflow
- Critical Thinking – Analytically and logically evaluating information, propositions, and claims
- Handling Conflict – Managing interpersonally strained situations
- Informing – Proactively obtaining and sharing information
- Legal & Regulatory Navigation – Understanding, interpreting, and ensuring compliance with laws and regulations

- Leveraging Technology – Applying technology for improvements in organizational efficiency and effectiveness
- Managing Performance – Ensuring superior individual and group performance
- Presentation Skill – Formally delivering information to groups
- Professional & Technical Expertise – Applying technical subject matter to the job
- Relationship Building – Establishing rapport and maintaining mutually productive relationships
- Self-Management – Showing personal organization, self-discipline, and dependability

WORKING CONDITIONS:

ENVIRONMENT:

This position works Work is performed in an office environment with frequent interruptions, moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Some work is performed off-site–visiting outside agencies, District facilities, and school sites.

PHYSICAL ABILITIES:

- ~~Hearing and speaking to exchange information and make presentations.~~
- ~~Seeing to read a variety of materials.~~
- ~~Dexterity of hands and fingers to operate a computer keyboard.~~
- ~~Sitting for extended periods of time while operating a computer.~~
- ~~Bending at the waist, kneeling or crouching to file materials.~~

Remains in a stationary position to perform desk work. Exchanges information in large group settings. Uses hands, wrists, and fingers repetitively to type and operate office equipment. Rotates the head right or left from a neutral position to review work materials. Uses near visual acuity at 20 inches or less to review work materials and operate a computer. Uses far visual acuity at 20 feet or more to observe presentations. Walks between areas of an office, school site, or facility to observe the environment. May walk across uneven surfaces.

~~**DUTIES APPROVED
BOARD OF EDUCATION:**~~

~~**CLASSIFICATION APPROVED
PERSONNEL COMMISSION:**~~

~~Revision: 09/01/2017~~

~~**CLASSIFICATION ESTABLISHED:**
Unknown~~

~~**REVISED:**
September 01, 2017
PROPOSED March 26, 2025~~

DIRECTOR, FISCAL AND BUSINESS SERVICES

BASIC FUNCTION

Under administrative direction, directs the budget development process, attendance accounting, fiscal accounting, payroll, and internal control activities and functions of the District while also supervising and evaluating the performance of assigned staff.

MINIMUM QUALIFICATIONS

EDUCATION:

Bachelor's degree in accounting, finance, business administration, or other field closely related to the duties and responsibilities of the position from an institution of higher learning accredited by a regional accreditation association, as recognized by the Council for Higher Education Accreditation. Foreign degrees and credit units require translation and equivalency established by an agency recognized by the Commission on Teacher Credentialing.

EXPERIENCE:

Three (3) years of experience managing a fiscal unit within a public agency and supervising the work of others. Supervisory experience may be, but need not be, acquired concurrently.

ADDITIONAL REQUIREMENTS/INFORMATION:

A valid California Driver License and the availability of private transportation or the ability to obtain transportation between job sites is required. Possession of a certificate in school business management is highly desirable.

REPRESENTATIVE DUTIES

- Develops, implements, and evaluates goals and objectives for department of Fiscal and Business Services
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JOB REQUIREMENTS

KNOWLEDGE:

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WORKING CONDITIONS

ENVIRONMENT:

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CLASSIFICATION ESTABLISHED:

Unknown

REVISED:

September 01, 2017

PROPOSED March 26, 2025

III. Next Regular Personnel Commission Meeting:

Wednesday, April 23, 2025, at 4:30 p.m. – *District Office Board Room*

IV. Adjournment: