



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

## **SPECIAL PERSONNEL COMMISSION MEETING AGENDA**

**May 29, 2025**

A special meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Thursday, May 29, 2025**, at **1:00 p.m.**, in the **District Administrative Offices**: 1717 4<sup>th</sup> 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 May 29, 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)

**May 29, 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 **Thursday, May 29, 2025**, at **1:00 p.m.**, in the **District Administrative Offices**: 1717 4<sup>th</sup> 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 May 29, 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:  
Assistant Superintendent, Business and Fiscal Services

**III. NEXT REGULAR PERSONNEL COMMISSION MEETING:**

Wednesday, June 11, 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:

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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.

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## 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: Thursday, May 29, 2025**

#### **AGENDA ITEM NO: II.A.01**

Classification Specification Revision: Assistant Superintendent of Business and Fiscal Services

#### **BACKGROUND INFORMATION:**

The district requested adjustments be made to the classification specification's minimum qualifications following a recent recruitment. This classification is designated a senior management position and, in accordance with Education Code Section 45256.5 and 35031, is exempt from certain provisions of the Merit System.

#### **METHODOLOGY:**

Staff conducted the following activities:

- Met with Assistant Superintendent, Human Resources, Dr. Douglas Meza, to discuss changes to the minimum qualifications

#### **ANALYSIS & FINDINGS:**

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

- Revise title formatting for consistency
- Revise Basic Function to include type of direction received
- Revise Education to include Master's degree
- Revise Experience for clarity by focusing on and more clearly defining managerial experience
- Revise Additional Requirements/Information for consistency and to include designation as senior management
- Revise Supervision for clarification and consistency
- Revise Working Conditions for consistency

#### **DIRECTOR'S RECOMMENDATION:**

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

<b>Commissioner</b>	<b>M</b>	<b>S</b>		<b>Yes</b>	<b>No</b>	<b>Abstain</b>	<b>ABSENT</b>
Lauren Robinson							
Mahshid Tarazi							
Phillip Tate							

## SANTA MONICA – MALIBU UNIFIED SCHOOL DISTRICT

### CLASSIFICATION DESCRIPTION

BARGAINING UNIT: Non-Represented

CLASS CODE: 510901

**CLASS TITLE: —ASSISTANT SUPERINTENDENT, OF BUSINESS AND FISCAL SERVICES**

### **BASIC FUNCTION:**

Under the direction of the Superintendent administrative direction, plan, organize, control and direct the District's fiscal and business activities including short- or long-term planning; formulate policies relating to the business and financial operations of the District; supervise and evaluate the performance of assigned personnel.

### **MINIMUM QUALIFICATIONS**

#### **EDUCATION:**

Master's degree in business administration, finance, public 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 the fiscal department or subdivision of a public agency, as defined by exercising discretion over the day-to-day operations of the fiscal unit and providing supervision to staff.

### **ADDITIONAL REQUIREMENTS/INFORMATION:**

- A valid California Driver License and availability of private transportation or ability to obtain transportation between job sites is required
- Certification in school business management is preferred
- Assistant Superintendent, Business and Fiscal Services is designated a senior management position and, in accordance with Education Code Section 45256.5 and 35031, is exempt from certain provisions of the Merit System

### **REPRESENTATIVE DUTIES:**

Plan, organize, control and direct the District's fiscal and business activities and short- or long-term planning including fiscal services, facilities management, computer services, food services, transportation services, risk management, purchasing and real estate. **E**

Direct and coordinate preparation of the annual budget for approval and adoption by the Board of Education; compile, analyze and consolidate budget information assure proper budgetary controls and transfer of funds to accomplished approved financial objectives; administer and direct the program of accounting for District funds. **E**

Assist the Superintendent in the development of business policies, procedures and programs for the District to improve efficiency and service; direct business and accounting activities in accordance with principles of sound fiscal management. **E**

Administer the District's financial program within State and County legal requirements and budget limitations; assure timely and accurate financial reporting; assure proper internal controls, audit trails and records maintenance. **E**

Expedite legal problems of the District with legal counsel. **E**

Supervise, direct and coordinate the work of personnel assigned to Business and Fiscal Services; evaluate immediate subordinates; select, train, transfer and terminate employees according to established procedures. **E**

Approved

12/3/96

**~~Assistant Superintendent of Business and Fiscal Services~~**

**Page 2**

Negotiate with employee groups in areas such as wages, working conditions and other matters. **E**

Develop and maintain short- and long-term financial planning and prepare written forecasts of income and expenditures; actively pursue additional funds for the District. **E**

Attend Board, public, staff and other meetings as assigned; prepare and present reports regarding the financial and business administration of the District. **E**

Communicate with other administrators, District personnel, contractors and various federal, State and County agencies to coordinate activities and programs, resolve issues and conflicts and exchange information. **E**

Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities and personnel; operate a computer in the preparation of correspondence, records and reports. **E**

Perform related duties as assigned.

## **SUPERVISION:**

Supervision is Administrative direction is received from the Superintendent.  
Supervision is exercised over ~~fiscal and business services personnel.~~  
management and office, technical, and business service staff.

## **~~KNOWLEDGE AND ABILITIES:~~ JOB REQUIREMENTS**

### ~~KNOWLEDGE OF:~~

Planning, organization and direction of the business and fiscal services of the District.

Principles and practices of governmental accounting, auditing and budget preparation, control and income forecasting related to a school district.

Principles and practices of administration, supervision and training.

Applicable laws, codes, regulations, policies and procedures.

Purchasing methods and practices involving the use of specifications and competitive bidding.

Approved

12/3/96

**~~Assistant Superintendent of Business and Fiscal Services~~ ————— Page 3**

Methods, procedures and planning involved in District construction projects.

Budget planning, development and reporting requirements.

Oral and written communication skills.

Interpersonal skills using tact, patience and courtesy.

Operation of a computer and assigned software.

### ~~ABILITY TO~~ ABILITIES:

Plan, organize and administer the business and fiscal services, activities and operations of the District.

Direct, coordinate and participate in the preparation of District budget.

Develop and implement improved accounting, record-keeping and budgetary procedures and systems.

Supervise and evaluate the performance of assigned staff.

Plan, organize and direct the establishment and maintenance of accounting records and systems.

Communicate effectively both orally and in writing.

Interpret, apply and explain rules, regulations, policies and procedures.

Analyze situations accurately and adopt appropriate course of action.

Meet schedules and time lines.  
Work independently with little direction.  
Plan and organize work.  
Prepare comprehensive narrative and statistical reports.  
Direct the maintenance of a variety of reports and files related to assigned activities.  
Establish and maintain cooperative and effective working relationships with others.  
Operate a computer and assigned office equipment.

## **EDUCATION AND EXPERIENCE:**

~~Graduation from college with a bachelor's degree in accounting, business or public administration, or related field and five years increasingly responsible professional experience in accounting, auditing, budget analysis and business management, including three years in a management capacity. The possession of an advanced degree and/or certification in school business administration is preferred.~~

Approved  
12/3/96

**Assistant Superintendent of Business and Fiscal Services** **Page 4**

## **LICENSES AND OTHER REQUIREMENTS:**

~~Valid California Class C driver's license.~~

## **WORKING CONDITIONS:**

### ***ENVIRONMENT:***

~~Office environment.~~

~~Driving a vehicle to conduct work.~~

**This is primarily a sedentary classification and the employee works in an office environment with 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/or school sites.**

### ***PHYSICAL ABILITIES DEMANDS:***

~~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.~~

**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 and construction. Walks between areas of an office, school site, or facility to observe the environment. May walk across uneven surfaces.

Approved  
12/3/96

**CLASSIFICATION ESTABLISHED:**  
**December 03, 1996**

**REVISED:**  
**PROPOSED: May 29, 2025**

## **ASSISTANT SUPERINTENDENT, BUSINESS AND FISCAL SERVICES**

### **BASIC FUNCTION**

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Under administrative direction, plan, organize, control and direct the District's fiscal and business activities including short- or long-term planning; formulate policies relating to the business and financial operations of the District; supervise and evaluate the performance of assigned personnel.

### **MINIMUM QUALIFICATIONS**

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#### **EDUCATION:**

Master's degree in business administration, finance, public 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 the fiscal department or subdivision of a public agency, as defined by exercising discretion over the day-to-day operations of the fiscal unit and providing supervision to staff.

#### **ADDITIONAL REQUIREMENTS/INFORMATION:**

- A valid California Driver License and availability of private transportation or ability to obtain transportation between job sites is required
- Certification in school business management is preferred
- Assistant Superintendent, Business and Fiscal Services is designated a senior management position and, in accordance with Education Code Section 45256.5 and 35031, is exempt from certain provisions of the Merit System

### **REPRESENTATIVE DUTIES**

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- Plan, organize, control and direct the District's fiscal and business activities and short- or long-term planning including fiscal services, facilities management, computer services, food services, transportation services, risk management, purchasing and real estate.
- Direct and coordinate preparation of the annual budget for approval and adoption by the Board of Education; compile, analyze and consolidate budget information assure proper budgetary controls and transfer of funds to accomplished approved financial objectives; administer and direct the program of accounting for District funds.
- Assist the Superintendent in the development of business policies, procedures and programs for the District to improve efficiency and service; direct business and accounting activities in accordance with principles of sound fiscal management.
- Administer the District's financial program within State and County legal requirements and budget limitations; assure timely and accurate financial reporting; assure proper internal controls, audit trails and records maintenance.
- Expedite legal problems of the District with legal counsel.

- Supervise, direct and coordinate the work of personnel assigned to Business and Fiscal Services; evaluate immediate subordinates; select, train, transfer and terminate employees according to established procedures.
- Negotiate with employee groups in areas such as wages, working conditions and other matters.
- Develop and maintain short- and long-term financial planning and prepare written forecasts of income and expenditures; actively pursue additional funds for the District.
- Attend Board, public, staff and other meetings as assigned; prepare and present reports regarding the financial and business administration of the District.
- Communicate with other administrators, District personnel, contractors and various federal, State and County agencies to coordinate activities and programs, resolve issues and conflicts and exchange information.
- Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities and personnel; operate a computer in the preparation of correspondence, records and reports.
- Perform related duties as assigned.

**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**

Administrative direction is received from the Superintendent. Supervision is exercised over management and office, technical, and business service staff.

## **JOB REQUIREMENTS**

### **KNOWLEDGE:**

- Planning, organization and direction of the business and fiscal services of the District
- Principles and practices of governmental accounting, auditing and budget preparation, control and income forecasting related to a school district
- Principles and practices of administration, supervision and training
- Applicable laws, codes, regulations, policies and procedures
- Purchasing methods and practices involving the use of specifications and competitive bidding
- Methods, procedures and planning involved in District construction projects
- Budget planning, development and reporting requirements
- Oral and written communication skills
- Interpersonal skills using tact, patience and courtesy
- Operation of a computer and assigned software

### **ABILITIES:**

- Plan, organize and administer the business and fiscal services, activities and operations of the District
- Direct, coordinate and participate in the preparation of District budget
- Develop and implement improved accounting, record-keeping and budgetary procedures and systems
- Supervise and evaluate the performance of assigned staff
- Plan, organize and direct the establishment and maintenance of accounting records and systems
- Communicate effectively both orally and in writing

- Interpret, apply and explain rules, regulations, policies and procedures
- Analyze situations accurately and adopt appropriate course of action
- Meet schedules and time lines
- Work independently with little direction
- Plan and organize work
- Prepare comprehensive narrative and statistical reports
- Direct the maintenance of a variety of reports and files related to assigned activities
- Establish and maintain cooperative and effective working relationships with others
- Operate a computer and assigned office equipment

## **WORKING CONDITIONS**

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### ***ENVIRONMENT:***

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Some work may be performed off-site visiting outside agencies, District facilities and/or school sites.

### ***PHYSICAL DEMANDS:***

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 and construction. Walks between areas of an office, school site, or facility to observe the environment. May walk across uneven surfaces.

### **CLASSIFICATION ESTABLISHED:**

**December 03, 1996**

### **REVISED:**

**PROPOSED: May 29, 2025**

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### **III. Next Regular Personnel Commission Meeting:**

Wednesday, June 11, 2025, at 4:30 p.m. – *District Office Board Room*

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#### **IV. Adjournment:**