



District Accounting Systems and Best Practices Committee Report

Pursuant to Proviso 1.100

May 31, 2026

Ellen E. Weaver
State Superintendent of Education

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Introduction

Pursuant to Proviso 1.100 (SDE: District Accounting Systems and Best Practices), the South Carolina Department of Education (SCDE) reconvened a study committee in 2025-2026 to continue evaluating and recommending improvements to district-level accounting systems. The committee was originally convened in 2024-2025 under Proviso 1.104 of that budget year. This report represents the Committee’s continued work through May 2026. The [2024-2025 Committee Report](#) outlined current challenges, presented a vision for modernization, and recommended actionable reforms and a three-year implementation plan beginning in July 2025. The committee’s second year of work was guided by the six primary goals established during year one:

1. Increase transparency for school district personnel, stakeholders, and policymakers.
2. Ensure alignment to accounting standards across the state.
3. Improve the ease of reporting.
4. Consolidate multiple reports into a streamlined reporting format.
5. Promote consistency of data across districts.
6. Increase efficiency for school district financial staff.

Committee Purpose and Composition

The South Carolina General Assembly established the District Accounting Systems and Best Practices Committee to recommend reforms that strengthen district accounting systems and promote financial best practices. The committee included representatives appointed by the Governor, State Superintendent, legislative leadership, the Revenue and Fiscal Affairs Office, and state education and finance associations.

Committee Members:

Member	Position
Tim Lyons, CPA (Chair)	Governor's Appointee
Rep. Jeff Bradley	House Education Chair's Appointee
Tonya V. Crosby, CPA	House Ways and Means Chair's Appointee
Larry Finney, CPA	Superintendent's Appointee
Dr. Harrison Goodwin	SC Association of School Administrators' Appointee
Amy Hagner	Senate Finance Chair's Appointee
Sen. Greg Hembree	Senate Education Chair's Appointee
Kendra Hunt	CFO of SC Department of Education
Mellanie Jinnette	SC School Boards Association's Appointee

Member	Position
Frank Rainwater	Revenue and Fiscal Affairs' Appointee
Nancy Williams	SC Association of School Business Officials' Appointee

The committee conducted structured listening sessions and gathered extensive feedback from district Chief Financial Officers, educational associations, and state agency personnel.

Committee Deliverables and Outcomes

The committee began implementation of the Year One workplan, developed the previous year, with emphasis on:

- Advancing the design and planning of a centralized statewide financial reporting platform to reduce manual data entry, increase data accuracy, and simplify compliance.
- Identifying challenges in current district financial processes and reporting structures.
- Developing tools and templates to improve financial governance and board-level decision-making.
- Finalizing a statewide list of required district reporting.
- Expanding work related to best practices toolkits and shared services opportunities.

The committee held four committee meetings convening between November 2025 and April 2026. It advanced implementation and planning efforts related to a statewide financial reporting platform, development and refinement of reporting requirements, and continued development of best practices and finance toolkits.

Year 1 Workplan Implementation (2025-26)

Recommendations of the 2024-25 committee that were included in the Year One workplan and were implemented during the 2025-26 year include the following:

Revision of the Financial Accounting Handbook *(Recommendation 5)*

- Draft revision of the Financial Accounting Handbook completed in November 2025.
- Reviewed by DASBP Committee members and Financial Accounting Handbook review committee completed in February of 2026.

- The finalized handbook will be available to all SC districts on July 1, 2026.

Create a comprehensive, consolidated reporting calendar that outlines required data elements, agencies, and frequencies (*Recommendation 9*)

- A listing of federal, state, and other mandated reporting requirements for districts has been compiled and reviewed by the committee.
- The final report will be available to SC districts by July 1, 2026.

Identify vendor to develop financial reporting platform (*Recommendations 13 – 14*)

- Invitation for Bid (IFB) has been drafted.
- Development of list of requirements.
- Data migration concerns and strategies have been identified.

Create statewide data standards for all financial reporting and accounting practices (*Recommendation 16*)

- South Carolina maintains accounting data standards within the Financial Accounting Handbook. In committee discussions, it was discovered that some districts may still be utilizing additional or older accounting codes requiring some level of review and clean up by district accounting personnel.
- Training for districts will be ongoing to ensure compliance with data standards.

Develop Finance Best Practices to be shared across SC districts (*Recommendation 17*)

- The committee has identified a Best Practices Tool kit to be made available to SC Districts by September 1, 2026. The tool kit will include guidance for:
 - Year-end closing checklist and audit preparation
 - Budgeting & District Board Communications
 - Fixed Assets
 - SC Educator
 - Student 45-Day and 135-Day data review
 - Federal Programs
 - Capital Financing & Debt Management
 - Procurement
 - Cash Management
- Additionally, the committee identified potential roles that could be effectively utilized in a Shared Services model for districts within a region:
 - Procurement Manager – oversee purchasing processes to ensure compliance with procurement laws and policies while achieving best value.

- Internal Auditor – provide independent assurance that internal controls, risk management, and governance processes are functionally effective.
- Fixed Assets / Capital Projects Accountant – manage and maintain district assets and capital projects.
- Chief Financial Officer – provide oversight and guidance to district finance and payroll teams within a region.

Develop and Implement a District Finance Bootcamp for new financial staff

(Recommendation 20)

- The Finance 101 Bootcamp was launched and hosted by SCDE finance staff in August 2025.
- The program, targeting district CFOs and finance staff, will be provided annually.
- Attendees surveyed after the August 2025 2-day bootcamp indicated a 4.8 out of 5 overall satisfaction rating.

Develop a mentorship program for new district CFOs and finance staff in partnership with SCASBO for pilot program *(Recommendation 22)*

- The Pilot program was successfully implemented through the South Carolina Association of School Business Officials (SCASBO) with participation from six school districts.

Year 2+ Implementation Timeline and Ongoing Oversight

Year 2 Implementation (2026–27): System Development and Pilot Phase

Finalize and adopt the revised Financial Accounting Handbook based on feedback from the January 2026 training and advisory group input (**Rec 5**).

Develop a process for ongoing handbook updates, aligned with best practices training cycles and national chart of accounts collaboration (**Rec 6**).

Roll out regional trainings on updated handbook and best practices across the state (**Rec 18**).

Coordinate with SCDE auditing staff to ensure revised handbook issues are integrated into audit protocols and best practices guidance (**Rec 7**).

Develop and pilot a uniform, software-agnostic financial reporting platform and submission framework, automation tools for district-controlled data reporting, and pre-submission error-checking tools (**Recs 11–14**).

Integrate audit-required reports into the consolidated reporting platform pilot (**Rec 15**).

Begin development of the early warning system to flag districts with fiscal health risks (**Rec 3**).

Begin design and development of financial dashboards for districts, SCDE, and legislators **(Rec 1)**.

Launch full mentorship program for new CFOs and finance staff based on pilot year results **(Rec 22)**.

Evaluate initial training and mentorship quality with feedback surveys and district support tracking **(Rec 23)**.

Year 3 Implementation (2027–28): Full Rollout and Evaluation

Establish an ongoing cycle to update the Financial Accounting Handbook, maintain statewide financial data standards and district reporting calendar, deliver regional training, monitor district consistency, and continuously improve support programs through regular feedback and evaluation. **(Recs 5–6, 16, 18–19, 21, 23)**

Fully implement the statewide financial reporting platform and unified submission framework, allowing all districts to submit data once through the standardized, validated, and automated process **(Recs 11–15)**.

Fully implement the early warning system for monitoring and identifying districts with elevated fiscal risks, with protocols for early support and technical assistance **(Rec 3)**.

Deploy financial dashboards statewide for district, SCDE, and legislative use, and conduct final dashboard training for end-users **(Recs 1–2)**.

Expand and formalize technical assistance, mentorship programs, and peer training networks to support continuous development of district financial staff **(Recs 22, 24)**.

Launch public-facing communications tools that clarify district financial reporting requirements, timing, and usage for all stakeholders, sustaining transparency efforts **(Rec 4.)**

Conclusion

The 2025-26 work of the District Accounting Systems and Best Practices Study Committee continued to advance statewide modernization efforts and provided actionable guidance to strengthen district financial practices. The committee's focus on centralized reporting tools, improved data integrity, and practical governance resources supports SCDE's broader objective of proactive oversight and stronger fiscal accountability across all school districts.

With the anticipated removal of the proviso in the upcoming fiscal year, Year Two activities represent a key transition point from committee planning into implementation, including the rollout of finance toolkits and continued progress on statewide platform developments.

Appendix A: Proviso 1.100 of 2025-2026

(SDE: District Accounting Systems and Best Practices) (A) The Department of Education shall convene and staff a study committee to examine and propose necessary revisions for improving district accounting systems and best practices.

(B) The study committee shall be comprised of the following individuals who each should have background and expertise in education finance:

- (1) one member appointed by the Governor; who shall serve as Chair of the task force;
- (2) the State Superintendent of Education or their designee;
- (3) the Chief Financial Officer of the State Department of Education;
- (4) one member of the South Carolina House of Representatives appointed by the Chair of the House of Representatives Education and Public Works Committee;
- (5) one member of the South Carolina Senate appointed by the Chair of the Senate Education Committee;
- (6) one member appointed by the Chair of the House of Representatives Ways and Means Committee;
- (7) one member appointed by the Chair of the Senate Finance Committee;
- (8) one member appointed by the Chair of the Board of the Revenue and Fiscal Affairs Office;
- (9) one member appointed by the Governor upon recommendation of the South Carolina Association of School Administrators;
- (10) one member appointed by the Governor upon recommendation of the South Carolina School Boards Association; and
- (11) one member appointed by the Governor upon recommendation of the South Carolina Association of School Business Officials.

(C) Members of the task force shall receive no compensation but may receive per diem and mileage from the South Carolina Department of Education as provided for boards and commissions.

(D) The task force must submit recommendations for potential reforms to the Governor, the Speaker of the House of Representatives, and the President of the Senate no later than May 31, 2026. Recommendations shall include, but not be limited to, the following areas:

- (1) increased transparency for school district personnel, stakeholders, and policymakers;
- (2) ensuring alignment to accounting standards across the State;
- (3) ease of reporting;
- (4) consolidation of multiple reports into a streamlined reporting format;
- (5) consistency of data across districts; and
- (6) increased efficiency for school district financial staff.

Appendix B: Committee Meetings and Activities

The South Carolina Department of Education (SCDE) established the District Accounting Systems & Best Practices Committee in response to Proviso 1.100, aiming to enhance the financial operations of school districts across the state. The committee's primary objectives include increasing transparency, aligning accounting standards statewide, simplifying reporting processes, consolidating multiple reports, ensuring data consistency across districts, and improving efficiency for school district financial staff.

Meeting 1: November 14, 2025

The members convened with a review of the committee's Year One recommendations and progress made since the May 2025 report reiterating the committee's statutory charge under Proviso 1.100.

Review of Year One Workplan Progress: a review of Year One accomplishments, lessons learned, and areas requiring additional focus was discussed, emphasizing the need for deeper district engagement and support to sustain improvements in district financial operations.

Overview of District Finance Processes: Jatana Norris, Chief Financial Officer for Jasper County Schools, and Dawn Robinson, SCDE Manager of Fiscal Practices, facilitated a detailed discussion on financial process challenges faced by school districts.

Key themes included:

Early Warning and Intervention Needs

- District financial challenges can develop quickly and require earlier intervention.
- Missing an audit or failing to submit required reports should be treated as an early warning indicator.
- Districts may delay requesting assistance due to fear, shame, or lack of confidence.

Strengthening Relationships and Communication

- SCDE Fiscal Practices should build trusted, proactive relationships with districts.
- Stronger coordination with auditing firms is needed to detect issues earlier.
- Lack of engagement with SCASBO may signal risk and capacity challenges.
- SCDE currently lacks a systematic way to track key district vacancies, particularly CFO positions.

Support for School Boards and Superintendents

Committee members discussed the need for stronger board and superintendent

understanding of district financial health, including what questions should be asked and how performance should be evaluated.

Suggested Best Practices and Tools

Recommendations included:

- Standard finance reporting packages for CFOs to present to boards and superintendents
- A model budget presentation template
- Expansion of SCASBO training expectations and potential certification models
- Mentor programs for new district finance staff
- A published checklist of requirements for district finance officers
- Model financial policies and procedures for statewide adoption

Improving HR–Finance Collaboration

The committee emphasized the importance of aligning staffing decisions with budget capacity and discussed the value of Position Control modules in district financial systems.

Meeting 2: January 12, 2026

The meeting opened with a recap of the November meeting and a reaffirmation of the committee’s purpose: advancing modernization of district accounting systems to improve data quality, reduce reporting burden, and enable more proactive statewide oversight.

Statewide Financial Platform Presentation (EdWise)

EdWise presented an overview of South Carolina’s current financial reporting environment and proposed a future-state statewide platform model.

Current State Challenges

- Districts operate independent financial systems without a centralized submission platform.
- Reporting relies heavily on manual spreadsheet processes.
- Inconsistent coding and validation practices increase errors and delays.
- Oversight workflows occur outside of automated systems.

Future State Vision

- A centralized statewide platform aligned to SCDE’s Chart of Accounts
- Automated validation prior to submission
- Digital certification workflows with audit history

- Standard dashboards and reporting tools for In\$ite, LARS, and ESSA
- Early warning indicators for financial risk

Anticipated Benefits

- Improved consistency and audit readiness
- Reduced administrative burden
- Faster submissions and fewer corrections
- Improved statewide visibility into district financial health

Committee Discussion

The committee discussed several implementation considerations.

Chart of Accounts Challenges

- Districts continue to use outdated codes that were not updated after changes were issued.
- A formal transition process is needed to ensure district compliance.
- Coordination with vendors is necessary to preserve historical coding integrity.

Data Migration Strategy

Two approaches were discussed:

- Transactional migration going forward
- Historical migration of three to five years of previously reported state-level data

The committee agreed that historical migration is feasible but should be approached carefully to minimize burden.

Pilot District Selection

The committee emphasized the need for a diverse pilot set, potentially including:

- Charter schools
- Small or underserved districts
- Districts with known coding challenges
- Districts sponsoring their own charter schools

Change Management

Members discussed the need to balance expectations and incentives, emphasizing that districts must understand the long-term benefits of the platform despite initial workload increases.

Finance Toolkits Discussion

Resources that help school boards ask informed financial questions. The committee discussed developing board and superintendent toolkits that align with the committee's modernization efforts and strengthen governance.

Meeting 3: February 26, 2026

Board Member Financial Training Initiatives: details shared regarding upcoming statewide financial training sessions for school board members led by Dr. Margaret Roza of the Georgetown Edunomics Lab. Committee members discussed the policy focus and anticipated impact of the training.

Improving Board Financial Presentations and Communication: committee discussion on best practices for presenting financial information to school boards. Members emphasized that board reporting must be clear, appropriately detailed, and paired with narrative context to support informed decision-making. The committee highlighted the importance of board engagement and understanding in the reporting process.

Chart of Accounts Cleanup and Standardization: committee members discussed the need to clean up and standardize chart of accounts usage across districts. The discussion included technical challenges, system limitations, and the importance of compliance to ensure accurate statewide reporting.

Future Meeting Planning and Shared Services Discussion

Committee members discussed future meeting topics, including shared services models for smaller districts and continued development of best practices toolkits. The group also discussed finalizing comprehensive reporting lists and standard best practice guidance for district finance operations.

Follow-Up Tasks Identified

- Refine and distribute written directions for chart of accounts cleanup
- Finalize and distribute the district reporting list
- Develop a best practices toolkit covering key operational finance functions
- Prepare ideas for shared services roles appropriate for smaller districts

Meeting 4: April 29, 2026

EdWise Dashboard IFB Update: update on the Invitation for Bids (IFB) for the EdWise dashboard. The committee reviewed the anticipated end product and functionality, noting

that the dashboard is intended to streamline reporting and provide more user-friendly access to financial data. The projected implementation timeline anticipates go-live in 2028.

Best Practices, Finance Toolkits, and Shared Services: updates on the development of best practices resources, finance toolkits, and shared services concepts.

Required Reporting List: the final list of district-required reporting was presented to the committee. Members provided feedback, and revisions were made.

Finance Checklist and Best Practice Items: the committee reviewed the finance checklist and best practice items. Committee members with relevant expertise were assigned topic areas to further develop and contribute best practice guidance.

Shared Services Discussion: the committee discussed roles that may be viable for regional shared services.

Roles identified as most viable included:

- Internal Auditor
- Chief Financial Officer (CFO), contingent upon quarterly budget review commitments rather than monthly reporting
- Procurement Manager
- Fixed Asset / Capital Projects Analyst

Roles identified as least likely to be effective in shared services included:

- General Ledger Manager
- Special Revenue Manager

The committee also discussed the potential for a shared Accounts Payable function where districts share similar systems and procedures.

No future meetings were scheduled, as the proviso will be removed in the upcoming fiscal year. For more information on the committee's activities and access to additional resources, please visit the SCDE's District Accounting Systems and Best Practices page: [District Accounting Systems and Best Practices](#)

Appendix C: District Reporting Requirements

Month Report Due	Proviso or Law
July	
SRO Quarterly Report	State
School District Administrative Claiming (SDAC)	Medicaid
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
SC Educator Updates	State
August	
District Minimum Salary Schedule	SC 59-20-50
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Final Expenditure Claims for Federal Grants	Federal/State
Fund Balance Report	Proviso
Medicaid Claims	Federal
PTO/Booster SLED Checks	
Submission of IDEA application	Federal
National Board Certification list	Proviso
September	
Model Safe Schools Checklist	Proviso
Posting of Budget online and average salaries	Proviso
Reading/Literacy Coaches	Proviso
Vacant School Facilities Survey	SC 59-41-170
Summer Reading Camp Expenditure Form	Proviso
Energy Office-Annual Energy Consumption Report	
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
IDEA Self Assessment	Federal
October	
SRO Quarterly Report	State
Surplus Property	Proviso
SDAC	Medicaid
Credit Card Transparency	Proviso
Check Register Transparency	Proviso

Fund Balance Report	Proviso
Review and Certification of 45-day student data	State

November

Charitable Organization’s Registration Exemption-Secretary of State	State
Medicaid Claims	Federal
45th Day Data Verification	State
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
Title I Comparability – Calculation complete	Federal
Claims deadline for previous quarter	Federal/State
Local Debt Reporting (State Treasurer’s Office)	State
SC Educator Updates	State
Unclaimed Property Report to State Treasurer’s Office	State

December

Audit Report	SC 59-17-170
Supplemental Schedule Spreadsheet	SC 59-17-170
Supportive Information Sheet	SC 59-17-170
IN\$ITE	State
Management Letter	SC 59-17-170
SF-Single Audit Confirmation	Federal
ESSA Per Pupil Reporting	Federal/State
Admin Cost Report	Proviso
Post audit report to web page	SC 59-17-170
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso

January

Continuing Disclosure Reporting EMMA	
IDEA MOE Calculator	Federal
SDAC	Medicaid
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
SLP4 Form	Federal
Fund Balance Report	Proviso
Title I Comparability – must be comparable	Federal
Review of ITA information from Dept of Revenue	State

February

IDEA Excess Cost Calculator	Federal
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Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
Claims deadline for previous quarter	Federal/State
Medicaid Claims	Federal

March

CFO Ethics Filing	State
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Food Services Excess Oper Bal - <i>Tonya to confirm</i>	Federal
Fund Balance Report	Proviso
Review and Certification 135-day student data	State

April

SDAC	Medicaid
SRO Quarterly Report	State
135th Day Data Verification	State
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso

May

Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
Claims deadline for previous quarter	Federal/State

June

Funding Flexibility Form	Proviso
Credit Card Transparency	Proviso
Check Register Transparency	Proviso
Fund Balance Report	Proviso
SC Educator Updates	State

Other

Surplus Property posting on web page	Proviso
SAM Registration	Federal
Monthly/Quarterly Federal Claims	Federal/State
Indirect Cost	State/Federal
Annual Procurement Audit (as applicable)	State
Minority Business Reports - POSSIBLY REMOVE	
8038 Tax Submissions	Federal

Appendix D: Regional Shared Services Roles

District finance roles with potential for regional shared services across districts

Special Revenue Analyst

Focuses on restricted funds—primarily federal, state, and grant funding (e.g., Title I, IDEA)

Key Responsibilities:

1. Monitor grant budgets and ensure expenditures align with approved plans
2. Ensure compliance with federal/state regulations (e.g., allowable costs, time & effort)
3. Prepare reimbursement requests and financial reports
4. Collaborate with program staff to track spending and projections
5. Support audits related to grant funding

Shared Services Model:

- One analyst could support multiple small districts
- Centralized tracking/reporting system for all districts
- Rotational support during peak periods (grant closeout, audit season)
- Particularly effective if districts use the same financial system

Procurement Manager

Oversee purchasing processes to ensure compliance with procurement laws and policies while achieving best value

Key Responsibilities:

1. Manage bid processes (RFPs, RFQs, IFBs)
2. Ensure compliance with state procurement laws and federal grant requirements
3. Oversee vendor selection, contract negotiation, and contract management
4. Develop and enforce procurement policies and procedures
5. Train staff in purchasing practices

Shared Services Model:

- Regional procurement office serving multiple districts
- Cooperative purchasing agreements across districts
- One manager overseeing multiple districts with local site-based buyers
- Standardized templates, contracts, and vendor pools

General Ledger Manager

Maintains the integrity of the district's financial records and reporting

Key Responsibilities:

1. Oversee chart of accounts and financial coding structure
2. Manage month-end and year-end close processes
3. Ensure accurate journal entries and account reconciliations
4. Coordinate with auditors and support audit requests
5. Ensure compliance with accounting standards

Shared Services Model:

- Centralized accounting team handling GL functions for multiple districts
- Standardized chart of accounts across districts
- Shared closing calendar and reporting structure
- Could be combined with AP/AR functions in a regional finance "hub"

Internal Auditor

Provides independent assurance that internal controls, risk management, and governance processes are functioning effectively

Key Responsibilities:

1. Conduct risk assessments and develop audit plans
2. Perform audits of financial, operational, and compliance areas
3. Evaluate internal controls and identify weaknesses
4. Issue audit reports with recommendations
5. Monitor corrective action implementation
6. Investigate fraud or misuse of funds (if needed)

Shared Services Model:

- One internal auditor or small team serving multiple districts
- Regional audit consortium or partnership
- Audit plan developed across districts based on risk prioritization
- Maintains independence by reporting to boards or oversight bodies rather than district administration

Fixed Assets / Capital Projects Accountant

Manage and maintain district assets and capital projects

Key Responsibilities:

1. Capital asset tracking and inventory
2. Depreciation schedules
3. Construction project accounting
4. Bond-funded project tracking

Shared Services Model:

- Centralized asset management system
- Periodic on-site inventories with centralized reporting

Accounts Payable (AP) Manager / Specialist

Manage and maintain district invoicing

Key Responsibilities:

1. Invoice processing and payment execution
2. Vendor file maintenance
3. Payment controls and fraud prevention

Shared Services Model:

- Central AP processor(s) serving multiple districts
- Standard invoice workflows and approval structures
- Strong internal controls across all participants