Information Sheet - 04-09-2024 - Board of Trustees Meeting

TO: Board of Trustees Item: 6.2

FR: Emily Stroup

DATE: April 9, 2024

RE: Updated Job Description - Business Services Specialist

The District is proposing an update of the following Classified Confidential position:

Business Services Specialist

Recommendation:

Approval of the Updated Job Description - Business Services Specialist

JOB DESCRIPTION

POSITION: Business Services Specialist
SALARY PLACEMENT: Classified Confidential

SUMMARY OF POSITION:
Under general supervision of the Chief Business Officer (CBO), performs District-wide financial functions involving accounting and record keeping; performs a variety of clerical and admin duties to coordinate office. Perform and coordinate complex office, clerical work involving independent judgment and requiring accuracy and speed. Interpret and explain school and District policies, rules and objectives.

MINIMUM QUALIFICATIONS - EDUCATION AND/OR TRAINING:
High School diploma or equivalent.

DESIRABLE QUALIFICATIONS - EDUCATION AND/OR TRAINING:
Experience in processing accounting/financial records and general office procedures. AA in accounting is helpful. Prior experience in school district budgets, including categoricals, preferred.

MINIMUM EXPERIENCE:
At least two years of increasingly responsible accounting/financial experience.

DESIRABLE EXPERIENCE:
Experience in business/school procedures. Knowledge of Microsoft Word, Microsoft Excel desired.

SKILLS AND ABILITIES:
1. Word processing at a minimum of 50 wpm
2. High level computer skills
3. Basic office methods, practices, and procedures, including filing systems, correspondence, standard English usage, spelling, grammar, and punctuation.
4. Knowledge of State Education Code and other applicable laws.
5. Knowledge of accounting procedures, district organization, operations, policies and objectives.

ESSENTIAL FUNCTIONS:
1. Provides confidential assistance to the CBO in administrative matters and projects.
2. Compiles, assembles, calculates, verifies, updates, and formats financial and statistical data for various state and federal reporting including other school district departments such as Food Services, MOT, and categorical funds.
3. Supports staff with reporting, budgeting, information of funding, including requisition and purchase order processing.
4. Ensures proper budgeting and accounting procedures are utilized throughout departments
5. Maintains cash accounts, receipts, and accounts receivable records

6. Reconciles bank statements
7. Prepares deposits of district revenue.
8. Prepares invoicing updates for district accounts receivable.
9. Prepares and performs General Ledger updates (including year-end).
10. Provide assistance and backup for all district accounts payable functions.
11. Assists in annual audit of all accounts process, provides supporting documentation and/or information on internal process for audit
12. Cross train and backup for other Business Service Functions as needed.
13. Establish cooperative working relationships with all district staff. Maintain a cheerful, helpful attitude. Be flexible and receptive to change.
14. Other duties as assigned

DIRECTLY REPORTS TO:
Chief Business Officer

PHYSICAL ENVIRONMENT:
Must be able to stand, walk, sit and lift up to 25 lbs., bend, twist, reach and stretch, elbow flexion and extension, shoulder extension and flexion, back lateral flexion, able to operate office machines and equipment, demonstrate manual dexterity necessary to operate calculator, typewriter, and computer keyboard, clear vision and hearing.

WORK ENVIRONMENT:
Employees in this position will be required to work in a District office environment; subject to many demands on time and constant interruptions. Employees may come in contact with school district staff, outside agencies, and the public.

UPDATED: April 2024
BOARD APPROVED: TBD