

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

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|--------------------|-----------------------------------|------------------------|---------------------|
| TITLE: | Budget Planning Support Assistant | REPORTS TO: | Budget Supervisor |
| DEPARTMENT: | Budget | CLASSIFICATION: | Classified |
| FLSA: | Non-Exempt | SALARY GRADE: | 020 Confidential |
| ISSUED: | January 16, 2002 | | |

BASIC FUNCTION:

Provide specialized clerical services in the Budget Department.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)

E = Essential Functions

Provide administrative support to the Budget Director and other administrative staff. **E**

Prepare journal vouchers for the district financial database from district cashier receipts. **E**

Create the Finance section of the Board of Education agenda including appropriation transfers, new adoptions, and corresponding resolutions. **E**

Maintain budget department timesheets and personnel files; maintain department operational records and files including historical financial documents. **E**

Coordinate the preparation and distribution of budget agendas for the district budget advisory committees. **E**

Maintain contact with community organizations, special interest groups, and senior district management staff to provide and obtain specialized financial information; provide specialized information to district staff and other agencies. **E**

Organize, compose and type correspondence and prepare reports; forward Board of Education resolutions to appropriate county and state agencies. **E**

Provide specialized service pertaining to the district's negotiations with designated exclusive Representatives and maintains confidential records and files. **E**

May lead and direct the work of clerical assistants.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE:

Any combination of training, experience, and/or education equivalent to four years of recent, full-time, paid, increasingly responsible office-clerical experience including one year of satisfactory service in a lower level office-clerical or secretarial job class with a school district. Graduation from a recognized four-year college with a directly related business, secretarial, or related major may be substituted for one year of the experience requirement.

LICENSES AND OTHER REQUIREMENTS:

None

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Correct English usage, grammar, spelling, punctuation and vocabulary.

District organization, key personnel, and functional responsibilities.

Modern office organization and procedures.

Operation of standard office equipment including microcomputers and related software applications.

ABILITY TO:

Operate standard office equipment including microcomputers and related software applications.

Communicate effectively orally and in writing.

Work cooperatively with all levels of staff and community representatives.

Keyboard at a net corrected speed of 25 words per minute.

Compose specialized and routine correspondence and compile data for reports.

Train and lead the work of clerical assistants.

Exercise diplomacy, tact, and judgment.

Plan and organize work.

Meet schedules and time lines.

Maintain records.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

WORKING CONDITIONS:

ENVIRONMENT: Office setting.

PHYSICAL REQUIREMENTS:

Hearing and speaking to exchange information; seeing to perform assigned duties; sitting for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Revised 3.23.04—PeopleSoft

Job Code 6845

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