

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Financial Planning Support Assistant	REPORTS TO:	Director, Financial Planning
DEPARTMENT:	Financial Planning	CLASSIFICATION:	Classified
FLSA:	Non-Exempt	SALARY GRADE:	020 Confidential
ISSUED:	April 28, 2009		

BASIC FUNCTION:

Provide specialized clerical services in the Financial Planning 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 Director, Financial Planning, 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 department timesheets and personnel files; maintain operational records and files including historical financial documents. **E**

Coordinate the preparation and distribution of 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 maintain confidential records and files. **E**

May lead and direct the work of clerical assistants.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE:

A 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 the school district.

LICENSES AND OTHER REQUIREMENTS:

Typing/keyboarding certificate at a net, corrected speed of 25 words per minute.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

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

District organization, key personnel, and functional responsibilities.

Modern office procedures and methods.

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

English reading and writing skills.

ABILITY TO:

Provide leadership and direction in assigned functions.

Compose specialized and routine correspondence and compile data for reports.

Operate standard office equipment including computers and related software applications.

Communicate effectively orally and in writing.

Work cooperatively with all levels of staff and community representatives.

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: Indoor, 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.

Job Code 6854

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