

## SANTEE SCHOOL DISTRICT

### **BUSINESS SERVICES COORDINATOR**

#### **DEFINITION**

Under direction of the Director of Fiscal Services, assists school district staff, administrators and management with the preparation of financial and budgetary reports including confidential data integral to collective bargaining; creates detailed financial comparisons, reports and graphs as requested by site and District administrators; assesses the microcomputer software and hardware needs of Business Services; performs installation and problem analysis of microcomputer applications; recommends and implements application enhancements, improvements or changes as required; supervises, instructs and evaluates assigned personnel in the Business Services department.

#### **DISTINGUISHING CHARACTERISTICS**

Coordinates, plans and organizes the maintenance of accounting and budgetary items including accounts receivable, contracts, financial reports, and special projects. Assists all levels of staff with technical and procedural assistance including budget analysis and projections. Knowledge is applied to analytical problem solving usually under prescribed and widely used principles and concepts. Receives general to limited supervision within a broad framework of policies and procedures, making decisions of a significant impact or consequence involving non-routine operations and the application and interpretation of data, facts, procedures and policy. Conducts research, analyzes related laws, regulations and data and makes recommendations on the formulation of new or revised fiscal related policies and procedures including impacts of proposed collective bargaining. Frequently advises and meets with program managers, internal staff, collective bargaining team, school district personnel, and auditors for the purpose of coordinating information and activities regarding data, policies, procedures and alternatives. Directs and supervises assigned personnel and programs including purchasing operations, "Just in Time Delivery" procedures, and the cash management procedures and personnel. Performs other duties as assigned.

#### **EXAMPLES OF DUTIES**

1. Assists school district administrators and management with preparation and analysis of financial and budgetary reports;
2. Creates detailed financial comparisons, reports and graphs as requested by consultants and district users; researches, creates and maintains analytical financial reports;
3. Designs report formats;
4. Creates new analytical reports as requested by management and school districts;
5. Provides confidential data analysis, reports and recommendations to collective bargaining team;
6. Develops multi-year projections for district budgets;

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### EXAMPLES OF DUTIES (cont.)

7. Researches and evaluates the utility of microcomputer software applications for financial and budgetary operations;
8. Modifies commercially available software to enhance its utility in the preparation of financial and budgetary information;
9. Determines the configuration of existing or anticipated computer equipment and electronic databases during the planning, installation and maintenance of microcomputer applications;
10. Installs microcomputer software applications;
11. Performs initial testing, data communications and problem correction analysis; assists in the preparation of hardware, software, or procedural documentation for Department personnel during application development and/or implementation;
12. Assists in training department personnel in the use of microcomputer hardware and software;
13. Assists as liaison between technology services, the State, districts and County Office staff;
14. Interacts with district personnel at all levels;
15. Develops and supervises the cash management procedures and personnel;
16. Supervises the "Just in Time Delivery" program and personnel;
17. Provides direction, training opportunities, and evaluates assigned personnel; and
18. Performs related duties as assigned.

### QUALIFICATIONS GUIDE

#### Knowledge of:

1. Basic financial accounting principles, procedures and analytical practices.
2. Acceptable budgetary projection and evaluation procedures.
3. Policies and practices governing public sector budget, accounting and general ledger functions.
4. Banking practices and procedures as they apply to district needs.
5. Procedures used in automated accounting systems.
6. Modern office practices, procedures and equipment.
7. Electronic data storage and retrieval systems as they pertain to financial accounting practices.
8. Financial and statistical record keeping and projection techniques.
9. Preparation, maintenance and electronic storage of current and accurate financial records.
10. Oral and written communication skills.
11. Principles of providing training and work direction to others.
12. Interpersonal skills including tact, patience and courtesy.

Ability to:

1. Perform complex, responsible and supervisory duties related to the district budget and general accounting functions and practices.
2. Evaluate the operation and function of office machines including computer equipment as it pertains to the needs of the department.
3. Prepare complex financial reports including profit and loss statements, balance sheets and budgetary projections.
4. Provide guidance and instruction to personnel who perform complex auditing and accounting work.
5. Understand, carry out and provide oral and written instruction.
6. Establish and maintain cooperative and effective working relationships with other district personnel and vendors.
7. Establish and maintain effective procedures regarding district banking accounts, balance verification and security practices.
8. Effectively evaluate and guide employees to perform and improve their duties for the benefit of the department and the district.

Training and Experience:

A combination of education and experience that clearly demonstrates possession of the knowledge and abilities listed above. Typical qualifying experience would include: two years experience working with microcomputer applications for financial and budgetary operations performing comparable duties and responsibilities; OR completion of college-level coursework in accounting, business administration, finance or closely related field and, work experience in the business, financial, or budgetary operation of a major unit in a large organization. Applicants must have experience with advanced spreadsheet and database applications. Knowledge of school finance/accounting principles is highly desirable.

Working Conditions:

District office environment.