

**TITLE: COORDINATOR OF FISCAL SERVICES**

**JOB GOAL:** Under the supervision of the Chief Financial Officer; plan; organize, and direct technical fiscal record management; budget preparation and management and audit and reporting functions.

**QUALIFICATIONS**

Knowledge of

1. Federal, state, and local laws, codes, and statutes related to public school accounting and facilities planning.
2. Applicable sections of State Education Code and other applicable codes, laws, rules and regulations related to assigned activities.
3. Modern management, fiscal and business policies, practices, and procedures.
4. Accounting and auditing principles and practices.
5. Principles and practices of administration, supervision, and training.
6. Effective public speaking techniques.
7. Bargaining Unit contracts and negotiation techniques.
8. District organization, operations, policies and objectives.
9. Interpersonal skills using tact, patience, and courtesy.
10. Budget preparation and control.
11. Coordination between all departments.
12. Oral and written communication skills.
13. Safety and workplace rules and regulations.

Ability to

1. Supervise the financial operations of the District established by the Board of Education and State of California.
2. Participate in the development of policies, procedures, and fiscal decisions.
3. Assist in the development of district budget and interim financial reports
4. Interpret and apply provisions of State Education Code and various regulatory agencies.
5. Assemble and analyze data and make appropriate recommendations.
6. Select, supervise, train, and evaluate assigned staff.
7. Read, interpret, apply and explain rules, regulations, policies and procedures.
8. Plan and conduct workshops related to all areas of school business management.
9. Meet schedules and timelines.
10. Analyze situations accurately and adopt an effective course of action.
11. Understand and carry out verbal and written instructions.
12. Communicate effectively both in oral and written form.
13. Handle all matters in a tactful, courteous, and confidential manner so as to maintain and/or establish good public relations.
14. Prepare accurate financial summaries, projections, reports, and correspondence independently without immediate supervision.
15. Assist in the maintenance of budget position control.
16. Assist in monitoring and follow-up of district audit findings.
17. Work successfully with diverse groups of people. Provide work direction and guidance to other employees.

Ability to (continued)

18. Prepare and present comprehensive fiscal, statistical and narrative reports in a clear and concise manner.

Training and Experience

1. Bachelor's Degree or higher preferred.
2. Five (5) years experience in administration responsibility and statistical analysis, at least two (2) of which have been in a position of budgetary or financial planning desired.
3. School site and/or district level management experience desired.
4. Completion of ACSA Business Academy or equivalent desired.

**REPORTS TO:** Chief Financial Officer

**SUPERVISES:** Business office personnel as assigned

**ESSENTIAL FUNCTIONS**

1. Provides direct support, coordination and communication within the fiscal services division to insure accurate and efficient operations.
2. Provides fiscal analysis to determine trends in projected expenditures and revenues to assist in the budget development process.
3. Reviews policies and programs essential to meet the needs of the district as required.
4. Uses and understands complex financial software such as the district Financial System and/or Student Information System.
5. Provides accounting services essential to the preparation, administration, and supervision of district funds.
6. Assists in the preparation of the annual budget and interim financial reports.
7. Assists with the district audit, provides follow-up and support.
8. Audits, monitors and evaluates the financial records of the District Office internal operation and the fiscal operation of school sites and departments.
9. Assists in the preparation of a variety of reports mandated by State and Federal agencies.
10. Plans, organizes and implements cost accounting systems to ensure adherence to budgetary and expenditure control guidelines, policies and regulations.
11. Reviews and verifies employment transmittals, contracts and appointments to ensure position control adherence and the availability of funds.
12. Assures income and expenditures for all funds applicable to the district are accounted and reported in accordance with the California School Accounting Manual and generally accepted accounting principles.
13. Completes and submits state and federal financial reports in a timely fashion as required for special projects.
14. Evaluates select staff members in the fiscal services section in a constructive and objective manner within the timelines set by the Human Resources office.
15. Monitors and evaluates the operations of the fiscal services department in order to assure that effective up-to-date methods are used wherever possible. Recommends, develops, and implements appropriate changes in policies and procedures as deemed necessary.
16. Provides consultation and training, including in-service workshops, for school site and district administrative personnel to assure understanding of fiscal processes.
17. Follows district policies and procedures.

## **ESSENTIAL FUNCTIONS** (continued)

18. Knows and follows the district Mission and Core Values and develops corresponding priorities for Fiscal Services.
19. Knows and follows safety rules and regulations for this position.
20. Performs other duties as assigned.

## **OTHER FUNCTIONS**

1. Obtains and provides financial data for county office and district departments as assigned.
2. Searches records and files to prepare reports and summaries.
3. Maintains the image of the school district through continued emphasis on professional appearance, conduct and quality of communication for all members of the fiscal services unit.

*This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but are intended to accurately reflect the principal job elements.*

## **PHYSICAL ABILITIES**

1. Visual ability to read handwritten or typed documents and the display screen of various office equipment and machines.
2. Able to conduct verbal conversation in English or other designated language.
3. Able to hear normal range verbal conversation (approximately 60 decibels.)
4. Able to sit, stand, stoop, kneel, bend, and walk.
5. Able to sit for sustained periods of time.
6. Able to climb slopes, stairs, steps, ramps, and ladders.
7. Able to lift up to ten (10) pounds frequently, and thirty (30) pounds occasionally.
8. Able to carry up to ten (10) pounds frequently, and thirty (30) pounds occasionally.
9. Able to push and pull objects weighing up to thirty (30) pounds.
10. Able to exhibit full range of motion for shoulder external rotation and internal rotation.
11. Able to exhibit full range of motion for shoulder abduction and adduction.
12. Able to exhibit full range of motion for elbow flexion and extension.
13. Able to exhibit full range of motion for shoulder extension and flexion.
14. Able to exhibit full range of motion for back lateral flexion.
15. Able to exhibit full range of motion for hip flexion and extension.
16. Able to exhibit full range of motion for knee flexion.
17. Able to demonstrate manual dexterity necessary to operate calculator, typewriter, and/or computer keyboard at the required speed and accuracy in a safe and effective manner.
18. Able to operate a motor vehicle in a safe and effective manner.

*While the ideal candidate will possess all of these abilities, duties assigned may be modified to accommodate some physical restrictions.*

## **SPECIAL REQUIREMENTS**

1. Must use safety equipment and devices designated for this position.
2. Possession and maintenance of a valid and appropriate California Driver's License during the course of employment; have an acceptable driving record; and must be insurable at standard rates by District's insurance carrier and maintain such insurability during the course of employment.

**TERMS OF EMPLOYMENT:** Twelve-month work year  
Classified Management

**EVALUATION:** Performance of this job will be evaluated in accordance with Board of Education policy on Evaluation of Professional Personnel. The evaluation will be completed by the Chief Financial Officer or designee.

Approved by: Board of Education    Date: 8/11/2016  
Date Revision: 8/12/21

**MURRIETA VALLEY UNIFIED SCHOOL DISTRICT IS A  
TOBACCO-FREE, DRUG-FREE WORKPLACE AND  
AN EQUAL OPPORTUNITY EMPLOYER**