

**TITLE: FISCAL SERVICES SUPERVISOR**

**JOB GOAL:** To assist in district budget development, revision, monitoring, and auditing, including position control; perform special accounting projects as required or assigned; supervise and evaluate the performance of assigned personnel.

**QUALIFICATIONS**

Knowledge of

1. State and district laws, policies, rules, and regulations pertaining to school accounting and record keeping requirements and standards.
2. Standardized Account Code Structure (SACS) and other relevant laws and regulations.
3. Laws, rules, and regulations related to assigned budget activities.
4. School district budgeting methods and processes.
5. School district audit guidelines and procedures.
6. Principles and practices of position control management.
7. Data processing equipment, to include a working knowledge of applications software, hardware specifications, and training requirements.
8. Principles and practices of administration and training.
9. Effective public speaking techniques.
10. District organization, operations, policies, and objectives.
11. Interpersonal skills using tact, patience, and courtesy.
12. Oral and written communication skills.
13. Correct English usage, spelling, grammar, and accounting terminology.
14. Ledger, statistical, and record-keeping procedures.
15. Safety rules and regulations for this position.

Ability to

1. Be a productive and active team member.
2. Prepare accurate financial summaries, projections, reports, and correspondence independently without immediate supervision.
3. Analyze, develop, and monitor budgets.
4. Prepare and assist in the preparation of budgets and board budget reports.
5. Assist in the budget development and implementation process.
6. Plan and conduct workshops related to budget development and monitoring.
7. Perform long-range planning and forecasting.
8. Maintenance of budget position control.
9. Monitor and follow-up on district audit findings.
10. Establish processes and procedures to improve compliance with state audit guidelines.
11. Operate office machines and equipment including a typewriter, copier, personal computer, and calculator proficiently.
12. Work successfully with diverse groups of people. Provide work direction and guidance to the other employees.

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*Ability To Continued:*

13. Present and maintain a pleasant appearance and demeanor.
14. Understand and carry out oral and written instructions, policies, and procedures.
15. Receive and give information over the telephone or in person in a courteous manner.
16. Plan, direct, and supervise the work of subordinates.
17. Communicate effectively and tactfully in both oral and written forms.
18. Handle all matters in a tactful, courteous, and confidential manner to maintain and/or establish good public relations.
19. Learn and follow the operations, procedures, policies, and requirements of an assigned program or operations unit.
20. Exercise independent judgment and problem-solving skills related to specific areas of responsibility.
21. Establish and maintain effective work relationships with those contacted in the performance of required duties.

Training and Experience

1. Bachelor's degree in accounting, finance, or business administration and three (3) years' professional level accounting experience.
2. Good work history and attendance.

**REPORTS TO:** Director of Fiscal Services or designee

**ESSENTIAL FUNCTIONS**

1. Plan, organize, and direct the activities and operations of assigned personnel.
2. Train, supervise, and evaluate the performance of assigned staff; develop and maintain systems to assign and track work; prepare and review position descriptions; participate in the interviewing, candidate selection, performance managing, and assigning of personnel; develop and provide training to assure personnel development and compliance with governmental regulations and district policies.
3. Provides accounting services essential to the preparation, administration, supervision, control of the budget.
4. Monitors and reconciles the position control system.
5. Coordinates, analyzes, and submits county, state, and federally required reports.
6. Uses and understands complex financial software such as the district Financial System.
7. Cooperates with the District's external auditors and helps facilitate access to District records.
8. May assist with internal auditing of school site accounting records. Review information for accuracy, identify discrepancies and make corrections and resolve problems as necessary.
9. Train department personnel as appropriate.
10. Assists in special financial or statistical research as required by the administration.

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*Essential Functions Continued:*

11. Interacts directly with administrators, program coordinators, and other district personnel regarding accounting, budgeting, and position control data.
12. Operates personal computer to generate lists, update records, monitor expenditures, respond to requests, etc.
13. Processes forms, applications, documents, records and/or other paperwork in support of assigned office functions.
14. Follows district policies and procedures.
15. Administration of requirements established by the California School Accounting Manual and generally accepted accounting principles.
16. Participates in district in-service training as required.
17. Prepares and conducts in-service trainings.
18. Knows and understands the Mission and Core Values of the district.
19. Performs other related duties as assigned.

*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.*

**OTHER FUNCTIONS**

1. Clears files at designated intervals.
2. Obtains and provides financial data for county office and district departments as assigned.
3. Searches records and files to prepare reports and summaries.

**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.

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**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 and provisions of professional personnel. The evaluation will be given by the Director of Fiscal Services or designee.

Approved by: Board of Education Date: April 14, 2022 (Fiscal Services Specialist)  
Board of Education Date: August 8, 2024 (Revised: Fiscal Services  
Supervisor)

**Murrieta Valley Unified School District is a drug-free &  
tobacco-free workplace and equal opportunity employer.**

The District does not discriminate against employees or job applicants on the basis of gender, race, color, religious creed, national origin, ancestry, age of 40, marital status, physical or mental disability, or Vietnam Era veteran status. Equal opportunity shall be provided to all employees and applicants in every aspect of personnel policy and practice. The District does not discriminate against person with disabilities who, with reasonable accommodation, can perform the essential functions of the job in question.