

BURBANK UNIFIED SCHOOL DISTRICT

CLASS TITLE: FISCAL SERVICES ASSISTANT

BASIC FUNCTION:

Under the direction of an assigned supervisor, perform advanced-level secretarial, budgetary and accounting duties requiring independent judgment and analysis; plan, organize and coordinate workflow and communications to assist the fiscal services administrators in administrative details.

REPRESENTATIVE DUTIES:

Serve as secretary to fiscal services administrators; plan, organize and coordinate activities to assist the administrator in administrative details.

Ensure timely communications between office and District employees; make phone calls to receive and transmit information; type memos, bulletins, letters and notices; prepare Board agenda items and related materials.

Assist in the preparation of various budget reports for the District, County and State.

Initiate and answer telephone calls; schedule appointments and interview callers, including teachers, administrators, parents and others; furnish information of a technical nature; screen and refer calls as appropriate.

Provide information to District personnel regarding various records, accounts and programs; answer questions and resolve problems related to site and department budgets.

Review printouts of site and program budgets to ensure accuracy, completeness and compliance with applicable regulations, requirements and established budgetary and accounting procedures and report financial status to supervisor; make corrections as necessary.

Take and transcribe, using any form of dictation or notetaking skills, correspondence, reports, bulletins and memoranda.

Plan and organize clerical services in areas of responsibility.

Make minor decisions in accordance with laws and regulations and apply them to problem situations.

Research and compile information and compute statistical information for federal, State and District reports and special projects as assigned.

Input a variety of financial and statistical data into computers and verify for accuracy.

Type a variety of items including inter-office communications, requisitions, forms, letters, special projects, legal documents and other materials; establish and maintain project and confidential files.

Attend a variety of meetings and take minutes; prepare and send out notices of meetings; collect and compile information for meetings, projects and workshops; prepare and distribute minutes.

Maintain a variety of complex records including payroll, lists and files.

Maintain financial records and assist in the budget process as directed.

Compile data for budget; post and maintain budget and financial records of a variety of programs.

Provide secretarial and clerical assistance to other staff as necessary; order supplies and materials and prepare purchase orders; assure adequate forms and supplies to support office operations.

Receive, open and screen incoming mail and independently compose replies according to established procedures.

Operate a variety of office equipment such as typewriter, calculator, computer and word processing hardware and copier.

Coordinate communications between supervisors and other District staff and the public.

Maintain confidentiality of information, including Board, District, personnel, pupil or controversial matters.

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

District organization, operations, policies and objectives.

Financial and statistical record-keeping principles.

Applicable sections of State Education Code and other applicable laws.

Organization, rules and programs related to an assigned office or function.

Modern office practices, procedures and equipment.

Telephone techniques and etiquette.

Statistical and financial record-keeping techniques.

Technical aspects of field of specialty.

Oral and written communications skills.

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

Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

Perform secretarial and administrative assistance duties for an administrator.

Perform technical accounting, budget and auditing work in the preparation, maintenance and review of District financial records, accounts and reports ensuring compliance with applicable rules, regulations, policies and procedures.

Apply auditing and financial record-keeping principals.

Work independently with little direction.

Type at 50 words net per minute from clear copy.

Analyze situations accurately and adopt an effective course of action.

Take and transcribe using any form of dictation or note taking skills.

Understand and follow oral and written directions.

Compose independently from oral instructions, notes, letters, memos, bulletins or other material.

- Work cooperatively and effectively with others.
- Read, and follow rules, regulations, policies and procedures relating to position.
- Operate various office machines including typewriter, computer and word processing hardware, copier and calculator.
- Make arrangements for meetings, workshops and conferences.
- Maintain a variety of filing systems.
- Maintain records and prepare reports.
- Make arithmetic calculations quickly and accurately.
- Meet schedules and time lines.
- Plan and organize work.
- Communicate effectively both orally and in writing.
- Attend meetings, conferences and workshops.
- Complete work with many interruptions.
- Work confidentially with discretion.
- Perform advanced-level secretarial duties.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: graduation from high school including or supplemented by courses in related areas and three years of increasingly responsible secretarial experience, preferably in a school district office.

WORKING CONDITIONS:

District office environment.