

**TITLE:** **FINANCE ASSISTANT/BUDGET-PURCHASING** **FLSA: Non-Exempt**

**QUALIFICATIONS:**

1. High School Diploma or GED.
2. Five (5) years of verifiable work experience in the areas of finance and budgeting. Additional training may be substituted in part for work experience.
3. Strong organizational and people skills.
4. Proficient in general office skills or typing and computer use including AS/400, Microsoft Office, Power Point, Office Applications WORD and EXCEL.
5. Additional or alternative qualifications to the above as the Board may find appropriate and acceptable.

**REPORT TO:** Senior Director of Business and Institutional Services

**SUPERVISES:** Personnel as assigned by the Senior Director

<b><u>JOB GOAL:</u></b> Prepare, monitor and amend district budget and obtain the best products and services at the best price.
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**PERFORMANCE RESPONSIBILITIES:** \*Essential Performance Responsibilities

- \* 1. Prepare annual Cash Flow Report.
- \* 2. Assist in the preparation and development of the Annual District Budget, including categorical funding and school budgets, and participate in the budget planning and review activities.
- \* 3. Monitor all school programs and department budgets to assure that expenditure codes are correct and within budget appropriations.
- \* 4. Confer with project managers on matters relating to fiscal, administrative, and budgetary policy.
- \* 5. Assist Senior Director in projecting, entering, reporting, and analyzing FTE and revenue.
- \* 6. Prepare Budget Amendments for the Board.
- \* 7. Keep abreast of current regulations and procedures related to accounting standards and state and federal reporting requirements.
- \* 8. Prepare Human Resource budget and maintain position control units and funding of all units.
- \* 9. Provide technical assistance to schools and departments as needed.
- \* 10. Train personnel to understand and interpret budgetary reports.
- \* 11. Enter tentative and final budget on the District's mainframe, and compile information for the School Board and public.
- \* 12. Maintain all appropriate files and records on expenditures and revenue for all projects. Assist with computation of personnel salaries and benefits for forecasting purposes. Monitor state projects' closing dates and work with responsible person to ensure that all appropriate closing accounts payable payments and reports are accomplished.
- \* 13. Review board agenda items, analyze financial impact, and make recommendations to the Senior Finance Director.
- \* 14. Prepare presentations to include charts, graphs, PowerPoint, or other visual aids.
- \* 15. Assist in all facets of assessing, developing and implementing effective purchasing procedures/programs for the District.
- \* 16. Assist in the writing of and preparation of bid invitations.
- \* 17. Oversee vendor clearance procedures to ensure compliance with local, state, and federal guidelines.
- \* 18. Maintain a reference library of suppliers for expediting purchases of supplies and equipment.
- \* 19. Evaluate and make recommendations for purchases that are in the best interest of the Board.
- \* 20. Use effective, positive interpersonal communication skills.
- \* 21. Train and work with secretaries.
- 22. Perform other duties as may be assigned by the superintendent or supervisor.

**PHYSICAL REQUIREMENTS:**

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of the job.

While performing the duties of this job, the employee is regularly required to sit; use hands to manipulate objects, tools, or controls; reach with hands and arms; and talk and hear.

The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and the ability to adjust focus.

Noise level in the work environment is usually quiet to moderate.

**TERMS OF EMPLOYMENT:** Salary and benefits shall be paid consistent with the District's approved compensation. Length of the work year and hours of employment shall be those established by the Board.

**EVALUATION:** Performance of this job will be evaluated in accordance with provisions of the Board's policy on evaluations of personnel.