

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Regular Meeting Agenda

3:30 P.M., December 18, 2018

710 Encinitas Blvd., Encinitas CA 92024

San Dieguito Union High School District Office - Large Board Room

REGULAR MEETING/OPEN SESSION

1. Call to Order Commission Chair
2. Pledge of Allegiance
3. Approval of the Agenda for the December 18, 2018, Personnel Commission Regular Meeting.
Motion by _____, second by _____, to approve the agenda for the December 18, 2018 Personnel Commission Regular Meeting.
4. Approval of the Minutes for the November 13, 2018 Personnel Commission Regular Meeting.
Motion by _____, second by _____, to approve the minutes for the November 13, 2018 Personnel Commission Regular Meeting.
5. Approval of the Minutes for the November 8, 2018 Personnel Commission Special Meeting.
Motion by _____, second by _____, to approve the minutes for the November 8, 2018 Personnel Commission Special Meeting.

ACTION ITEMS (See Supplements)

6. Public Hearing: Appointment of Personnel Commissioner
At the regularly scheduled Personnel Commission meeting held on November 13, 2018, John Baird (CSEA appointed commissioner) and Justin Cunningham (Board appointed commissioner) publicly announced that Jeffery Charles is their intended "joint-appointee" to the Personnel Commission for the December 1, 2018-December 1, 2021 term of service.
 - A. Open Public Hearing
 - B. Call for Public Comment
 - C. Close Public Hearing
7. Appointment of Personnel Commissioner
The Appointee of the Governing Board and the Appointee of the Classified Employees appoint Jeffery Charles to the December 1, 2018 - December 1, 2021 term.
Motion by _____, second by _____, to appoint Jeffery Charles to the Personnel Commission for the December 1, 2018 - December 1, 2021 term.
8. Organization of the Personnel Commission:
 - A. Nomination/Election of Chair for the Personnel Commission
Open Nominations for Chair for the Personnel Commission

Motion by _____, second by _____, that nominations be closed and that _____ be elected Chair of the Personnel Commission for 2019.

B. Nomination/Election of Vice-Chair for the Personnel Commission
Open Nominations for Vice Chair for the Personnel Commission

Motion by _____, second by _____, that nominations be closed and that _____ be elected Vice-Chair of the Personnel Commission for 2019.

C. Personnel Commission Meeting Dates and Times

Motion by _____, second by _____, to approve the schedule for the regular meetings of the Personnel Commission for 2019 as listed on the attached supplement, "Personnel Commission Meeting Schedule 2019," to be held at 3:30 P.M. in the District Office Board Room #101 or alternate room, depending on availability.

9. ELIGIBILITY LISTS TO BE ESTABLISHED

A. Motion by _____, second by _____, to establish an Eligibility List for ACCOUNTING TECHNICIAN, SR-42, Open/Promotional-Dual Certification, six months eligibility.

10. ELIGIBILITY LISTS TO BE APPROVED

A. Motion by _____, second by _____, to approve an Eligibility List for ACCOUNTING SPECIALIST, SR-52, Open/Promotional-Dual Certification, eligibility from 11/08/18.

B. Motion by _____, second by _____, to approve an Eligibility List for CAMPUS SUPERVISOR, SR-32, Open/Promotional-Dual Certification, eligibility from 11/28/18.

C. Motion by _____, second by _____, to approve an Eligibility List for DIRECTOR OF PURCHASING, Management Salary Group 5, Range 10, Open/Promotional-Dual Certification, eligibility from 12/06/18.

D. Motion by _____, second by _____, to approve an Eligibility List for SCHOOL BUS DRIVER, SR-38, Open/Promotional-Dual Certification, eligibility from 12/07/18.

11. JOB DESCRIPTION UPDATES

A. Motion by _____, second by _____, to approve class description revisions for Senior Buyer as proposed.

B. Motion by _____, second by _____, to approve class description revisions for Accounting Assistant - ASB as proposed.

DISCUSSION/INFORMATION ITEMS (See Supplements)

12. STAFF COMMENTS ON PERSONNEL ACTIVITIES

- A. Vacancy Report
- B. Other

13. CORRESPONDENCE

14. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised

during public comments except to 1) acknowledge receipt of the information, 2) refer to staff for further study, or 3) refer the matter to the next agenda.

- A. California School Employees Association
- B. San Dieguito Union High School District
- C. Public

15. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, January 22, 2019, at 3:30 P.M. in the San Dieguito UHSD Board Room, 710 Encinitas Blvd., Encinitas, CA 92024.

16. ADJOURNMENT

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Regular Meeting Minutes

3:30 P.M., November 13, 2018

710 Encinitas Blvd., Encinitas, CA 92024

San Dieguito Union High School District Office - Board Room

REGULAR MEETING/OPEN SESSION

1. CALL TO ORDER

The meeting was called to order at 3:32 p.m. by JOHN BAIRD. As Vice-Chair, Commissioner Baird chaired the meeting.

2. PLEDGE OF ALLEGIANCE

Commissioner Baird led the pledge of allegiance.

Members in Attendance

John Baird

Jeffery Charles

Justin Cunningham

Staff in Attendance

Susan Dixon, Director

Barbara Bass, Human Resources Analyst

Kathy Potter, Human Resources Technician

Guests

Carmen Blum

Tina Douglas

Dr. Robert Haley

Lori Nelson

3. APPROVAL OF THE AGENDA FOR THE NOVEMBER 13, 2018, PERSONNEL COMMISSION REGULAR MEETING.

It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve the agenda for the November 13, 2018, Personnel Commission Regular Meeting.

Passed unanimously

4. APPROVAL OF THE MINUTES FOR THE OCTOBER 9, 2018, PERSONNEL COMMISSION REGULAR MEETING.

It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve the minutes for the October 9, 2018, Personnel Commission Regular Meeting.

Passed unanimously

ACTION ITEMS

5. ELIGIBILITY LISTS TO BE ESTABLISHED

A. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to establish an Eligibility List for ACCOUNTING SPECIALIST, SR-52, Open/Promotional, six months eligibility.

B. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for CAMPUS SUPERVISOR, SR-32, Open/Promotional-Dual Certification, six months eligibility.

- C. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to establish an Eligibility List for DIRECTOR OF PURCHASING, Management Salary Group 5, Range 10, Open/Promotional-Dual Certification, six months eligibility.
- D. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for EXECUTIVE ASSISTANT, Confidential, SR-1, Open/Promotional-Dual Certification, six months eligibility.
- E. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to establish an Eligibility List for CHIEF FINANCIAL OFFICER, Management Salary Group 5, Range 2, Open/Promotional-Dual Certification, six months eligibility. Note: this classification was retitled to Director of Fiscal Services in a subsequent motion (See Item 10. F.)
All passed unanimously

6. ELIGIBILITY LISTS TO BE APPROVED

- A. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT-BILINGUAL, SR-31, Open/Promotional-Dual Certification, eligibility from 10/10/18.
Passed unanimously
- B. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve an Eligibility List for NUTRITION SERVICES SUPERVISOR, Supervisory Salary Range 4, Open/Promotional, eligibility from 10/11/18.
Passed unanimously with addition of Salary Range
- C. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for NUTRITION SERVICES ASSISTANT I, SR-25, Open/Promotional-Dual Certification, eligibility from 10/17/18.
Passed unanimously
- D. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SpEd (Non-Severe), SR-34, Open/Promotional-Dual Certification, eligibility from 10/25/18.
Passed unanimously
- E. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SpEd (Severe), SR-36, Open/Promotional, eligibility from 10/25/18.
Passed unanimously

7. APPOINTMENT OF PERSONNEL COMMISSIONER

- A. It was moved by JOHN BAIRD, seconded by JUSTIN CUNNINGHAM to publicly announce JEFFERY CHARLES as the “Intended Appointee” of the Classified Employees and the Governing Board.

Note: Item 7.A. and 8.A. were temporarily tabled while waiting to receive information. Discussion and action on these items was resumed once information was received.

Passed unanimously

8. PUBLIC HEARING DATE

- A. It was moved by JUSTIN CUNNINGHAM, seconded by JOHN BAIRD, to set an open public hearing date after 30 days, which is determined to be December 18, 2018.

Note: the December Personnel Commission meeting date was rescheduled from December 11, 2018 to December 18, 2018 to accommodate the required 30-day timeline for a public hearing.

Passed unanimously

9. DISCIPLINARY HEARING

- A. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES to open discussion on the disciplinary hearing.

Passed unanimously

Director Dixon provided information in advance of the motion. Some discussion followed.

- B. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to appoint Kristine Kwong as the hearing officer for the upcoming employee disciplinary hearing.
Passed unanimously

10. JOB DESCRIPTION UPDATES

- A. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve class description revisions for Secretary as proposed.
- B. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve class description revisions and retitle Administrative Secretary-Middle School to Administrative Assistant I as proposed.
- C. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve class description revisions and retitle Administrative Secretary to Administrative Assistant II as proposed.
- D. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to approve class description revisions and retitle Administrative Assistant to Administrative Assistant III as proposed.
- E. It was moved by JUSTIN CUNNINGHAM, seconded by JEFFERY CHARLES, to approve class description revisions and retitle Administrative Assistant-High School to Administrative Assistant IV as proposed.
Following a discussion, the motions for Job Description Updates A. – E. were revised to change the term “as assigned” to “as needed”.
- F. It was moved by JEFFERY CHARLES, seconded by JUSTIN CUNNINGHAM, to retitle the classification of Chief Financial Officer to Director of Fiscal Services as proposed.
All passed unanimously

DISCUSSION/INFORMATION ITEMS (See Supplements)

11. STAFF COMMENTS ON PERSONNEL ACTIVITIES

- A. Vacancy Report
- B. Personnel List Report
- C. Other

12. CORRESPONDENCE- Director Dixon shared information regarding registration for the annual CSPCA Conference which will be held in Anaheim this year. She shared that due to budgetary considerations, she will not be attending the conference. Commissioners Charles and Cunningham indicated they do not plan on attending; Commissioner Charles has attended in past years and Commissioner Cunningham will be attending the Merit Academy. As a member of the CSPCA Board, Commissioner Baird plans to attend.

13. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised during public comments except to 1) acknowledge receipt of the information, 2) refer to staff for further study, or 3) refer the matter to the next agenda.

- A. California School Employees Association – Carmen Blum applauded the PC staff on a wonderful and challenging year. She requested that internal alignment be considered as classifications are studied.
- B. San Dieguito Union High School District - None
- C. Public - None

14. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, December 18, 2018, at 3:30 P.M. at San Dieguito UHSD office, 710 Encinitas Boulevard, Encinitas, CA 92024. See item 8.
A.

15. ADJOURNED TO CLOSED SESSION – 5:10 PM

16. CLOSED SESSION

- A. Annual Evaluation of Director, Classified Personnel
- B. Administrative Process

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Special Meeting - Minutes

2:00 P.M., November 8, 2018

710 Encinitas Boulevard, Encinitas, CA 92024

Technology Training Room 206

1. SPECIAL MEETING/OPEN SESSION

The meeting was called to order at 2:06 p.m. by John Baird, Commission Chair.

2. Pledge of Allegiance

The pledge of allegiance was led by Commissioner Baird.

Members in Attendance

John Baird

Jeffery Charles

Justin Cunningham

Staff in Attendance

Susan Dixon, Director

Kathy Potter, Human Resources Technician

Guests

Laura August

Debbie Johnson

3. APPROVAL OF THE AGENDA

It was moved by Justin Cunningham, seconded by Jeff Charles, to approve the agenda for the November 8, 2018 Personnel Commission Special Meeting.

Passed unanimously

4. PUBLIC COMMENTS

The Public Comments Section of the Special Meeting provides the opportunity for individuals to address items that are on the Special Meeting agenda.

5. DISCIPLINARY HEARING

A. It was moved by Jeff Charles, seconded by Justin Cunningham to open a discussion to review and discuss which hearing officer will be appointed for the upcoming disciplinary hearing.

Passed unanimously

B. It was moved by Justin Cunningham, seconded by Jeff Charles, to amend and postpone motion 5.B (appointment of hearing officer for the upcoming employee disciplinary hearing) to the November 13, 2018 Regular Commission Meeting subject to availability of all parties.

Passed unanimously

**San Dieguito Union High School District
PERSONNEL COMMISSION**

**Special Meeting
Public Hearing**

2:00 P.M., November 8, 2018

Technology Training Room 206

6. **NEXT MEETING OF THE PERSONNEL COMMISSION**

The next regular meeting of the Personnel Commission is scheduled for Tuesday, November 13, 2018, at 3:30 PM in the District Office Large Board Room 101, 710 Encinitas Boulevard, Encinitas, CA 92024.

7. **ADJOURNMENT**

The meeting adjourned at 3:22 p.m.

PERSONNEL COMMISSION MEETING SCHEDULE

2019

Tuesday, 3:30 p.m.	January 22, 2019	District Office Room 101
Tuesday, 3:30 p.m.	February 12, 2019	Tech Training Room 206
Tuesday, 3:30 p.m.	March 12, 2019	District Office Room 101
Tuesday, 3:30 p.m.	April 9, 2019	District Office Room 101
Tuesday, 3:30 p.m.	May 14, 2019	District Office Room 101
Tuesday, 3:30 p.m.	June 11, 2019	District Office Room 101
Tuesday, 3:30 p.m.	July 9, 2019	District Office Room 101
Tuesday, 3:30 p.m.	August 13, 2019	District Office Room 101
Tuesday, 3:30 p.m.	September 10, 2019	District Office Room 101
Tuesday, 3:30 p.m.	October 15, 2019	District Office Room 101
Tuesday, 3:30 p.m.	November 12, 2019	District Office Room 101
Tuesday, 3:30 p.m.	December 10, 2019	District Office Room 101

**San Dieguito Union High School District
Personnel Commission
Eligibility List
Open/Promotional**

**Effective: 11-8-18
Expiration: 5-8-19**

Accounting Specialist

	Applicant ID	Rank
Promo	2970307	1
	2897880	2
Open	1001553	1
	3873649	1
	1252318	2

S. Dixon

**San Dieguito Union High School District
Personnel Commission
Eligibility List
Dual Certification**

Effective: 11-28-18

Expiration: 5-28-19

Campus Supervisor

Applicant ID	Rank
3675309	1
1627064	2
1680798	3
3870061	4

S. Dixon

**San Dieguito Union High School District
Personnel Commission
Eligibility List
Open/Promo - Dual Certification**

**Effective: 12/06/18
Expiration: 06/06/19**

Director of Purchasing

Rank	Applicant ID
1	3114877
1	497120
2	1856095

S. Dixon

San Dieguito Union High School District
Personnel Commission
Eligibility List
Open/Promotional - Dual Certification

Effective: 12/10/18
Expiration: Continuous

School Bus Driver

Rank	Applicant ID
1	987654
2	3841403
3	1048041
4	3871821

S. Dixon

Classification Review Report	
Classification	Senior Buyer
Classification Type	Classified
Salary Range	44
Prepared By	Susan Dixon, Director, Classified Personnel Barbara Bass, Human Resources Analyst
Submission to Classification Advisory Committee	October 2, 2018 October 30, 2018
Submission to Personnel Commission	December 18, 2018
Agenda Item	Job Description Update

Background Information

The Purchasing Department has experienced significant changes since many of the job descriptions were last updated in the early 2000's. The most notable change occurred approximately eight years ago when the Purchasing Department converted from a centralized warehouse model to a decentralized model where supplies are shipped directly to each department or school site rather than shipped to warehouse staff and stored in a warehouse. The advent of free one to two day shipping was a key factor in switching to this model. It was no longer necessary to maintain a large warehouse of supplies in order to provide internal clients with quick access to needed materials. This decentralized model is quite unique in that it has not caught on at most school districts; the centralized warehouse model remains as the standard in San Diego County. The many advantages of the direct-ship model include cost savings in terms of warehouse staff and use of District vehicles to transport supplies as well as a reduction of waste which can occur when stored materials become outdated or damaged due to dampness or rodents.

The decentralization model had immediate and clear effects on warehouse staff as multiple employees were no longer needed to perform warehouse and delivery duties. Whereas the Purchasing Department used to employ three warehouse employees, warehouse staff was reduced to one employee. The highest level classification, Warehouse Supervisor was retained and the incumbent performs the full scope of the remaining duties of the warehouse functions. This classification will also be reviewed and subsequently updated to capture current duties performed by the incumbent.

The Senior Buyer job description was last updated in 2001. Proposed revisions have been made to update the description to facilitate ease of reading (using a bulleted format) as well as to reflect the current duties of the two incumbents. Additionally, the knowledge and abilities required were reviewed and updated to ensure they are appropriately related to the assignment.

Sources of Information

Incumbents in the job class
Director of Purchasing
Joint Powers of Authority, San Diego County Office of Education
Comparable districts in San Diego County

Salary Compensation Review

The classifications below have been reviewed and determined to be viable comparisons in terms of evaluating whether the District’s rate of pay is appropriate. SDUHSD is the only district among all of our comparisons to employ a Contracts Analyst. Many of the duties associated with bidding and contracting that fall on our Contracts Analyst fall on Senior Buyers in other districts.

Senior Buyer

District	Salary Range	Job Title	Minimum	Maximum
Carlsbad Unified School District	27	Buyer	\$22.86	\$27.76
Grossmont Union High School District	46	Buyer II	\$22.30	\$28.37
Oceanside Unified School District	28	Buyer	\$21.27	\$26.95
San Marcos Unified School District	80	Buyer	\$23.44	\$29.97
Vista Unified School District	52	Buyer	\$21.43	\$28.82
<i>Average</i>			\$22.26	\$28.37
SDUHSD	44	Senior Buyer	\$23.08	\$30.97

Recommendation

Revise the class description for Senior Buyer as presented.
Retain the currently salary allocation of Range 44 on the Classified Salary Schedule.

Vote by Committee Members:

Vote	Member	Vote	Member
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Absent	Matt Colwell, CSEA	Yes	Marley Nelms, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

CLASSIFIED

TITLE — SENIOR BUYER

OVERALL JOB PURPOSE STATEMENT JOB SUMMARY

Under the direction of the Director of Purchasing, ~~and Warehousing, the job of t~~The Senior Buyer ~~is done for the purpose of~~ determines procurement methods, processes, vendors, and delivery choices which provide the greatest value to the district. ~~and initiating bidding processes; , procuring assigned product lines; , recommending bid awards; , maintaining warehouse inventory levels; identifying products which will enhance efficiency, effectiveness and safety iof district operations; , maintaining the fixed asset inventory system; , making reservations for travel and accommodations for employees on District approved travel; and~~ The Senior Buyer works with staff at all levels to determine what choices will provide the greatest value to the district and takes appropriate action to resolve ~~sing~~ complaints and improve ~~ing~~ customer service both internally and externally with vendors. The Senior Buyer provides expertise and guidance in all areas of the financial software system. ~~receives direction from the Director of Purchasing.~~

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

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ESSENTIAL FUNCTIONS

The Senior Buyer may perform any combination of the following:

~~The Senior Buyer may perform any combination of the following:~~

~~Analyzes bids and quotations for the purpose of evaluating adherence to specifications and~~

~~recommending the completeness of the award to the Director of Purchasing and Warehousing.~~

~~Assists individuals, school districts, county, state and others for the purpose of providing information and resolving disputes.~~

~~Attends in services, classes, workshops, conferences for the purpose of keeping informed on changes and trends that effect purchasing activities and appropriate accounting codes.~~

~~Compares item descriptions and amounts in bids and contracts for the purpose of ensuring proper processing of data and providing necessary information.~~

~~Coordinates/maintains purchasing records, files, purchase orders for the purpose of ensuring proper processing of data and providing necessary information. Documents activities/actions for the purpose of providing accurate records and an audit trail.~~

- Evaluates requisitions and works with district staff at all levels ~~for the purpose of~~ to determine the appropriate type of procurement methods, ~~adherence to specifications, product choices, vendor choices, available piggyback options, shipping methods and location, discounts, shipping charges, options, fees, costs, and other factors to determine total cost and best value.~~
- Makes purchasing ~~in order to make~~ recommendations to the Director of Purchasing, and district staff, ~~and others to provide the~~ based upon factors such as cost, quality, specifications, date item(s) is needed, and overall best value ~~for the district.~~
- ~~obtaining quotes~~ and initiating ~~initiates the bidding process.~~ Works with individuals inside and out of the district ~~district staff, vendors, other school districts, county agencies, state agencies, consortiums, Joint Powers of Authorities PA's, and other organizations for the purpose of~~ to evaluate ~~ing~~ purchasing alternative options for the district , providing ~~ing~~ support and information, and resolving ~~ing~~ disputes.

CLASSIFIED

TITLE — SENIOR BUYER

- ~~Prepares specifications and requests for bids in consultation with appropriate District staff on technical and quality requirements. Coordinates/maintains purchasing records, files, purchase orders for the purpose of ensuring proper processing of data and providing necessary information. Documents activities/actions for the purpose of providing accurate records and an audit trail.~~
- ~~Coordinates and maintains purchasing records, files, reports, purchase orders, quotes, requisitions, product information, delivery information, vendor information, piggyback bid documents and other back-up purchasing-related documents in accordance with established procedures. for the purpose of ensuring proper processing of data, maintenance of accurate records, historical purchase data, and fulfilling the audit trail.~~
- ~~Has advanced knowledge and skill with the district financial software system and provides training and support to other district staff on its use. (see Knowledge of...) Provides training and support to district staff in the use of the district financial software system as it relates to purchasing functions.~~
- ~~Has advanced knowledge and capability to utilize vendor specific Web based shopping sites. (See Knowledge of...) Searches vendor-specific web-based shopping sites to research products, pricing and other information.~~
- ~~Analyzes bids and , quotesations and contracts to confirm for the purpose of evaluating adherence to specifications, compares item descriptions and amounts, and makes recommendations to the Director of Purchasing. and recommending the completeness of the award to the Director of Purchasing and Warehousing.~~
- ~~ConfersNegotiates with vendors concerning price, discounts, specifications, shipping rates, and product informationother variables that add value or reduce cost for the district.~~
- ~~Reviews purchase order information to ensure accuracy and completeness and obtains approvals before placing orders in accordance with established procedures.~~
- ~~Provides information regarding purchasing services and status of items purchasedUnderstandsAdheres to bid limits, service contract requirements, and public works contracting requirements, and other California laws and regulations regarding purchasing, contracting, and bidding, to ensure district legal compliance.~~
- ~~Contacts customers, internal and external, to ensure items were received, obtains signed receiving paperwork is signed and returnedpts from customers, and follows up on delayed orders, resolves order issues, and processes returns.~~
- ~~Maintains the fixed asset inventory system.~~
- ~~Monitors warehouse stock inventory levels with system generated reports for the purpose of reordering stock to maintain inventories at levels adequate to meet projected needs.~~
- ~~Monitors customer satisfaction of goods and services items received, for the purpose of toand, resolving resolves complaints and improving improves the quality of services and productsitems purchasedservice and products provided in the future.~~
- ~~Reconciles and audits differences between purchase orders and invoices.~~
- ~~Prepares specifications and requests for bids in consultation with appropriate District staff on technical and quality issues for the purpose of procuring assigned product lines (e.g. physical education and art equipment and supplies) in accordance with legal requirements for government procurement.~~
- ~~Prepares a variety of reports and documents such as warehouse catalogues and bid reports for the purpose of disseminating information to customers or for awarding bids.~~

CLASSIFIED

TITLE — SENIOR BUYER

- ~~Processes requests for travel from district employees for the purpose of reserving complete and necessary travel and accommodations and preparing listings for board agenda approval.~~
- Reconciles/audits differences between purchase orders and invoices for the purpose of providing a timely delivery of checks, billing invoices and other accounting related materials.
- Researches new products, contractors, suppliers, equipment, **available purchasing contracts**, and regulations ~~for the purpose of identifying to~~ **identify** those which will enhance **satisfaction, productivity**, efficiency, effectiveness and/or safety of various operations inside and outside the classroom and ~~for ensuring to ensure~~ conformity to regulations and budgetary guidelines ~~and amount issue.~~
- Attends in-services, classes, workshops, **and** conferences ~~for the purpose of keeping to keep~~ informed ~~on about~~ changes and trends that effect purchasing activities and ~~appropriate accounting codes~~ **the financial software system.**
- **Assists with District surplus and asset tracking.**
- ~~Assists other personnel as may be required for the purpose of supporting them in the completion of their work activities.~~
- ~~Oversees/directs less experienced workers, temporary help and youth programs for the purpose of completing job assignments accurately.~~
- **Performs other job-related duties as assigned.**

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

~~KNOWLEDGE, SKILLS AND ABILITIES~~

KNOWLEDGE OF:

- **Methods and procedures used in purchasing goods and services for a school district**
- **Legal and procedural requirements related to purchasing, including applicable sections of State Education code and other applicable laws**
- **Accounting practices and procedures related to purchasing**
- ~~Advanced knowledge of district financial software system~~
- **Financial software systems**
- **Vendor-specific web-based shopping sites**
- **Current, up-to-date, office practices and procedures**
- **Electronic and manual record keeping practices**
- **Workplace math such as arithmetic operations, percents, rounding and problem solving**
- **Correct English usage, grammar, spelling, punctuation and vocabulary**
- **Business writing, proofing, and editing**

~~is required to perform algebra and/or geometry; read technical information, compose a variety of documents and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: legal and procedural requirements in the procurement and acquisition of goods and services for a school district; accounting practices and procedures; applicable sections of State Education Code and other applicable laws; methods and procedures used in the purchasing of school district supplies and equipment; concepts of grammar and punctuation; modern office practices, procedures and equipment.~~

CLASSIFIED

TITLE — SENIOR BUYER

SKILLS are required to perform multiple technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; preparing and maintaining accurate records; and performing accounting procedures.

ABILITY TO:

is required to schedule activities; routinely gather, collate and/or classify data; and use basic job related equipment. Flexibility is required to work with others under a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of different types and/or purposes; and utilize job related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is moderate; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups; meeting deadlines and schedules; setting priorities; working as part of a team; and working with detailed information/data.

- Obtain, analyze, and evaluate bids and quotations.
- Provide information to others regarding purchasing practices and policies.
- Research products, contractors, suppliers, equipment, and regulations.
- Order, process and, reconcile and audit purchase orders, requisitions, and invoices.
- Identify, investigate, and resolve order issues.
- Learn, interpret, apply and explain laws, codes, rules, policies and procedures.
- Keep informed about changes and trends in purchasing and accounting practices.
- Compose written communications using correct grammar, spelling, punctuation and vocabulary.
- Adapt to changing work priorities.
- Operate a variety of office equipment.
- Use current, up-to-date software applications to perform job duties efficiently.
- Communicate with courtesy, diplomacy, and tact.
- Establish and maintain cooperative working relationships with others.
- Establish and maintain records and files.
- Perform accurate math calculations.
- Plan, prioritize, and organize work, meeting schedules and timelines.
- Exercise appropriate judgment when making decisions.
- Complete routine tasks thoroughly, accurately and with attention to detail.

RESPONSIBILITY

Responsibilities include: working under limited supervision; directing other persons within a small work unit; and operating within a defined budget and/or financial guidelines. Utilization of resources from other work units is sometimes required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

EDUCATION AND EXPERIENCE

CLASSIFIED

TITLE — SENIOR BUYER

Job-related education necessary to perform the essential job duties; typically consistent with graduation from high school or equivalent. -College-level courses in business, purchasing, or a related field preferred. -Two years clerical experience years' progressively responsible experience involving work with a purchasing functions or accounting office is required.

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: Positions in the purchasing series ensure proper process of purchasing and acquisition of equipment, services and supplies required to maintain both the District's instructional and support operations. The Senior Buyer is a classification within the Purchasing series. Positions in this series provide clerical and more progressively responsible purchasing support as the series progresses.

The **Senior Buyer** is an advanced-level and technical classification responsible for the complex business procedures involved in purchasing and warehouse inventory replenishment including the efficient, timely and economical accomplishment of purchasing activities. This class also serves as a resource to Buyers, other District personnel, vendors and other outside parties for information regarding the acquisition of supplies, equipment and services and trains and supports staff in the use of the district financial software system.

Distinctions between the Senior Buyer and purchasing positions above and below are distinguished as follows:

This class is distinguished from ~~the~~ **Director of Purchasing and Warehousing** which is responsible to for planning, ~~organize~~ **organizing** and directing the District's purchasing and warehousing (replace with asset management?) functions.

This class differs from that of **Buyer** which is responsible for assisting in the procurement and acquisition of material and services for the District provides primarily by providing technical support to purchasing activities including such as is responsible for reviewing requisitions, soliciting pricing, and processing purchase orders. The Buyer works closely with the Senior Buyer and Director of Purchasing for to determine compliance with items and services within established guidelines and laws. Buyer is responsible for or from existing bid lists and by entering information into the purchasing data system district financial software system.

REQUIRED TESTING

None Specified.

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

CERTIFICATES

Valid California Class C driver's license; record of driving history issued by the California DMV on its Form H-6 less than 30 days prior to applying for the position.

CONTINUING EDUCATION/TRAINING

CLASSIFIED

TITLE — SENIOR BUYER

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.

EDUCATION

High School Diploma or equivalent supplemented by courses in business, purchasing or related field.

WORKING ENVIRONMENT

The usual and customary methods of performing the job 's-functions requires ~~the following~~ physical demands: ~~as outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability. some lifting, carrying, pushing and/or pulling; some climbing and balancing; some stooping, kneeling, crouching and/or crawling; and significant reaching, handling, fingering and/or feeling. Generally the job requires 60% sitting, 20% walking and 20% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.~~

Physical Demands Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

Seldom	stooping/bending, squatting/crouching, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	_____walking, standing, lifting 11-25 lbs. at waist
height, carrying 11-25 lbs.	up to 25 feet, lifting up to 10 lbs.
overhead or at shoulder height,	carrying up to 10 lbs. up to 25 feet
Occasionally/Frequently	handling/simple grasping, sitting, neck flexation/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability to communicate with staff, vendors, and others ~~on telephones~~; Able to respond to safety bells and emergencies. Vision ability to see near, distant, color, depth and peripherally.

ENVIRONMENTAL CONDITIONS

None

EDUCATION AND EXPERIENCE

CLASSIFIED

TITLE — SENIOR BUYER

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. College-level courses in business, purchasing, or a related field preferred. ~~Two years clerical experience in a purchasing or accounting office.~~ Two years of progressively responsible experience involving work with purchasing functions is required.

~~REQUIRED TESTING~~

~~None Specified.~~

~~Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.~~

~~CERTIFICATES~~

~~Valid California Class C driver's license; record of driving history issued by the California DMV on its Form H-6 less than 30 days prior to applying for the position.~~

~~CONTINUING EDUCATION/TRAINING~~

~~Participation in ongoing job-related training as assigned.~~

~~CLEARANCES~~

~~California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.~~

~~FLSA STATUS~~ _____

~~Nonexempt~~

~~SALARY GRADE~~

~~Supervisory~~

SENIOR BUYER

JOB SUMMARY

Under the direction of the Director of Purchasing, the Senior Buyer determines procurement methods, processes, vendors, and delivery choices which provide the greatest value to the district. The Senior Buyer works with staff at all levels to determine what choices will provide the greatest value to the district and takes appropriate action to resolve complaints and improve customer service both internally and externally with vendors. The Senior Buyer provides expertise and guidance in all areas of the financial software system.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Senior Buyer may perform any combination of the following:

- Evaluates requisitions and works with district staff at all levels to determine the appropriate procurement methods, adherence to specifications, product and vendor choices, available piggyback options, shipping methods and location, discounts, shipping charges, options, fees, costs, and other factors to determine total cost and overall best value.
- Makes purchasing recommendations to the Director of Purchasing and district staff based upon factors such as cost, quality, specifications, date item(s) is needed, and best value.
- Works with district staff, vendors, other school districts, county agencies, state agencies, consortiums, Joint Powers of Authorities, and other organizations to evaluate purchasing options, provide support and information, and resolve disputes.
- Coordinates and maintains purchasing records, files, reports, purchase orders, quotes, requisitions, products, deliveries, vendors, piggyback bid documents, and other purchasing related documents in accordance with established procedures.
- Provides training and support to district staff in the use of the district financial software system as it relates to purchasing functions.
- Searches vendor-specific internet shopping sites to research products, pricing and other information.
- Negotiates price, discounts, specifications, shipping rates, and other variables that add value or reduce cost for the district.
- Reviews purchase order information to ensure accuracy and completeness and places orders in accordance with established procedures.
- Adheres to bid limits, service and public works contract requirements, and other California laws and regulations regarding purchasing, contracting, and bidding.
- Contacts customers to ensure items were received, receiving paperwork is signed and returned, and follows up on delayed orders, order issues, and returns.
- Monitors customer satisfaction of items received, resolves complaints and improves the quality of service and products provided.
- Reconciles differences between purchase orders and invoices.
- Researches new products, contractors, suppliers, equipment, available purchasing contracts, and regulations to identify those which will enhance satisfaction, productivity, efficiency, effectiveness and/or safety of various operations inside and outside the classroom and to ensure conformity to regulations and budgetary guidelines.

SENIOR BUYER

- Attends in-services, classes, workshops, and conferences to keep informed about changes and trends that effect purchasing activities and the financial software system.
- Assists with District surplus and asset tracking.
- Assists other personnel as may be required.
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Methods and procedures used in purchasing goods and services for a school district
- Legal and procedural requirements related to purchasing, including applicable sections of State Education code and other applicable laws
- Accounting practices and procedures related to purchasing
- Financial software systems
- Vendor-specific web-based shopping sites
- Current, up-to-date office practices and procedures
- Electronic and manual record keeping practices
- Workplace math such as arithmetic operations, percents, rounding and problem solving
- Correct English usage, grammar, spelling, punctuation and vocabulary
- Business writing, proofing, and editing

ABILITY TO:

- Obtain, analyze, and evaluate bids and quotations.
- Provide information to others regarding purchasing practices and policies.
- Research products, contractors, suppliers, equipment, and regulations.
- Process and reconcile purchase orders, requisitions, and invoices.
- Identify, investigate, and resolve order issues.
- Learn, interpret, apply and explain laws, codes, rules, policies and procedures.
- Keep informed about changes and trends in purchasing and accounting practices.
- Compose written communications using correct grammar, spelling, punctuation and vocabulary.
- Adapt to changing work priorities.
- Operate a variety of office equipment.
- Use current, up-to-date software applications to perform job duties efficiently.
- Become an advanced user of the district financial software system and train others.
- Communicate with courtesy, diplomacy, and tact.
- Establish and maintain cooperative working relationships with others.
- Establish and maintain records and files.
- Perform accurate math calculations.
- Plan, prioritize, and organize work, meeting schedules and timelines.
- Exercise appropriate judgment when making decisions.
- Complete routine tasks thoroughly, accurately and with attention to detail.

CLASSIFIED

SENIOR BUYER

EDUCATION AND EXPERIENCE

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. College-level courses in business, purchasing, or a related field preferred. Two years of progressively responsible experience involving work with purchasing functions is required.

DISTINGUISHING CHARACTERISTICS

The Senior Buyer is a classification within the Purchasing series. Positions in this series provide clerical and more progressively responsible purchasing support as the series progresses.

The **Senior Buyer** is an advanced-level classification responsible for the complex business procedures involved in purchasing. This class also serves as a resource to Buyers, staff, vendors and other outside parties for information regarding the acquisition of supplies, equipment and services and trains and supports staff in the use of the district financial software system.

Distinctions between the Senior Buyer and purchasing positions above and below are distinguished as follows:

The **Director of Purchasing** is responsible for planning, organizing and directing the District's purchasing and warehousing functions.

The **Buyer** is responsible for reviewing requisitions, soliciting pricing, and processing purchase orders. The Buyer works closely with the Senior Buyer and Director of Purchasing to determine compliance with established guidelines and laws. Buyer is responsible for entering information into the district financial software system.

REQUIRED TESTING

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

CERTIFICATES

Valid California Class C driver's license; record of driving history issued by the California DMV on its Form H-6 less than 30 days prior to applying for the position.

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.

CLASSIFIED

SENIOR BUYER

WORKING ENVIRONMENT

The usual and customary methods of performing the job functions require physical demands as outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Physical Demands Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

Seldom	stooping/bending, squatting/crouching, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	walking, standing, lifting 11-25 lbs. at waist height, carrying 11-25 lbs. up to 25 feet, lifting up to 10 lbs. overhead or at shoulder height, carrying up to 10 lbs. up to 25 feet
Occasionally/Frequently	handling/simple grasping, sitting, neck flexion/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability to communicate with staff, vendors, and others. Able to respond to safety bells and emergencies. Vision ability to see near, distant, color, depth and peripherally.

ENVIRONMENTAL CONDITIONS

None



Union High School District

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Jeffery Charles, Commissioner
Justin Cunningham, Commissioner
Susan Dixon, Director

Classification Review Report	
Classification	Accounting Assistant - ASB
Classification Type	Classified
Salary Range	40
Prepared By	Susan Dixon, Director, Classified Personnel Barbara Bass, Human Resources Analyst
Submission to Classification Advisory Committee	April 24, 2018 October 2, 2018 October 30, 2018
Submission to Personnel Commission	December 18, 2018
Agenda Item	Job Description Updates

Background Information

The Accounting Assistant-ASB job description was last updated in 2001. A recent Accounting Assistant-ASB vacancy prompted the update to the job description to reflect the improved formatting/readability and the addition of the "Working Environment Standards."

Sources of Information

Marissa Ortega, Accounting Technician
Laura Main, Accounting Assistant - ASB
Joint Powers of Authority, San Diego County Office of Education
Comparable districts in San Diego County

Salary Compensation Review

The classifications below have been reviewed and determined to be viable comparisons in terms of evaluating whether the District’s rate of pay is appropriate.

Accounting Assistant-ASB

District	Salary Range	Job Title	Minimum	Maximum
Carlsbad Unified School District	21	ASB Accounting Technician	\$ 19.68	\$ 27.71
Escondido Union High School District	27	School Finance Clerk/Athletics-ASB Secretary	\$ 17.19	\$ 23.03
Grossmont Union High School District	44	School Finance Technician	\$ 21.16	\$ 26.86
Oceanside Unified School District	20	ASB Cashier/Clerk	\$ 17.24	\$ 21.79
Poway Unified School District	32	High School Accounting Technician	\$ 19.78	\$ 24.10
Ramona Unified School District	23	Accounting Technician I	\$ 16.06	\$ 20.59
San Marcos Unified School District	63	Accounting Technician	\$ 21.27	\$ 27.14
Sweetwater Union High School District	57	ASB Accounting Technician	\$ 23.89	\$ 29.39
Vista Unified School District	52	School Finance Technician	\$ 21.27	\$ 28.61
Average			\$ 19.73	\$ 25.47
SDUHSD	40	Accounting Assistant-ASB	\$ 20.97	\$ 28.06

Recommendation

Revise the Accounting Assistant-ASB job description as presented.
 Retain the current salary allocation of Range 40 on the Classified Salary Schedule.

Vote by Committee Members:

Vote	Member	Vote	Member
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Absent	Matt Colwell, CSEA	Yes	Marley Nelms, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

ACCOUNTING ASSISTANT-ASB ACCOUNTING ASSISTANT-ASB

OVERALL JOB PURPOSE STATEMENT SUMMARY

The job of Accounting Assistant-ASB is done for the purpose of maintaining financial books and records of student body accounts and district accounts related to the site; ensuring proper processing of financial data and providing necessary information; properly securing accounting and receiving cash and checks; and providing information, verifying accuracy of accounts and providing an audit trail.

The Accounting Assistant-ASB maintains the Associated Student Body (ASB) financial books and records for a high school under the direction of an assigned administrator. The Accounting Assistant-ASB processes and records transactions, maintains ASB accounts, and prepares financial reports.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Assistant-ASB may perform any combination of the following:

- Establishes/ and maintains a wide variety of student body, club, district fund accounts for the purpose of ensuring proper processing of data and providing necessary information.
- Collects/ and deposits monies for various activities and sales. for the purpose of properly accounting, receipting and securing cash and checks for both site-based funds and District general funds.
- Prepares and maintains financial records and reports such as balances, income, expenditures, scholarships, sales, general ledger, transfers, receipts, cash, balances, and deposits.
- Enters financial data into accounting system, initiates queries, develops spreadsheets, generates a variety of reports and statements, and maintains automated records and files, ensuring accuracy of input and output of data.
- Compares and reconciles various fiscal statements, records and reports to assure accurate fund accounting; reviews and audits data, records and reports for accuracy and completeness; identifies, researches and resolves errors and discrepancies.
- Generates/ and prepares periodic and special accounting reports and financial statements for the purpose of providing information, verifying accuracy of accounts and providing an audit trail.
- Prepares and processes purchase orders, invoices, reimbursements, and billings for payment and ensures purchases comply with established guidelines.
- Provides financial information and explains rules and procedures for fundraisers, events, and activities to staff, students and parents. Communicates with principal, ASB director, students, teachers, parents and district staff for the purpose of providing information about financial aspects of activities, events and fund raisers and explaining policies, rules and procedures.
- Posts/assembles/tabulates/compares financial and statistical data for the purpose of maintaining, updating and recording accounts and financial records. Calculates, reviews and posts a variety of financial and statistical data.
- Oversees financial operation of student-related fund-generating-raising activities (e.g. store sales, event ticket, parking stickers, etc.) for the purpose of ensuring proper accounting, such as ticket and event sales and provides providing guidance and supervision to students, volunteers, and staff.

CLASSIFIED

ACCOUNTING ASSISTANT-ASB

- Prepares cash boxes used at events and accounts for all funds used and collected. (e.g. games, dances, fund raisers, etc.) for the purpose of ensuring adequate cash to make sales and accounting for all funds used and collected.
- Sells bus passes, yearbooks, event tickets, parking passes, work books, and/or supplies, etc. for the purpose of supporting various student and school programs and events that raise funds.
- Assists ASB director and principal for the purpose of in developing and maintaining budgets, and following procedures regarding accounting policies and procedures and recommending improvements.
- Contacts vendors, district purchasing department, and warehouse personnel for the purpose of ordering items and verifying/correcting billings.
- Processes bills, requisitions, invoices and transfers for the purpose of making payments and disbursing funds, verify shipments, and maintaining accounts.
- Prepares/processes documents and information for the purpose of completing financial transactions, maintaining files and completing a variety of clerical tasks.

OTHER FUNCTIONS

- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE OF:

is required to perform algebra and/or geometry; read a variety of manuals, write documents following prescribed formats and/or present information before groups; and solve practical problems. Specific knowledge required to satisfactorily perform the functions of the job includes: accounting/bookkeeping principles; concepts of grammar and punctuation.

- Methods, procedures and terminology used in technical accounting work.
- Guidelines, practices, policies and procedures related to ASB accounting functions.
- Financial and statistical record-keeping techniques.
- Preparation of financial statements and comprehensive accounting reports.
- Use and processing of purchase orders, requisitions, receivables, invoices and related documents.
- Policies and objectives of assigned programs and activities.
- Preparation, review and control of assigned accounts.
- Data control procedures and data entry operations.
- Current, up-to-date office practices and procedures.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

SKILLS are required to perform single technical tasks with an occasional need to upgrade skills due to changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records.

ABILITY TO:

is required to schedule a number of activities; often gather, collate, and/or classify data; and use basic job related equipment. Flexibility is required to work with others under a variety of circumstances;

ACCOUNTING ASSISTANT-ASB

analyze data utilizing defined but different processes; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of different types and/or purposes; and utilize job related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups; working as part of a team; working with constant interruptions; and working with detailed information/data.

- Perform a variety of technical accounting duties and functions.
- Maintain accurate financial and statistical records.
- Prepare comprehensive accounting reports and statements.
- Identify, investigate and resolve financial errors and discrepancies.
- Organize, safeguard, and comply with financial recordkeeping practices and policies.
- Monitor and audit revenue and expenditures.
- Process incoming cash, monies, deposits and receipts.
- Prepare data for records and reports.
- Interpret, apply and explain rules, regulations, policies and procedures.
- Process purchase orders and requisitions.
- Maintain, balance, adjust and reconcile accounts.
- Prepare invoices, billings and reimbursements for payment.
- Operate standard office equipment including a computer and assigned software.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Understand and resolve issues, complaints and problems.
- Work with minimal supervision and exercise appropriate judgment when making decisions.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Communicate with courtesy, diplomacy and tact.

RESPONSIBILITY

Responsibilities include: working under standardized instructions and/or routines focusing primarily on results; leading, guiding and/or coordinating other persons; and monitoring the use of funds. Utilization of resources from other work units may be required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

DISTINGUISHING CHARACTERISTICS

The Accounting Assistant-ASB is distinguished from the Accounting Technician, the next level in the accounting/finance job family as follows:

The **Accounting Assistant – ASB** is a journey-level classification that performs responsible and varied accounting and related clerical functions requiring independent judgment over all student accounts and District funds as assigned and serves as the site expert for ~~Associated Student Body~~ ASB fund accounting. Positions in this class work directly with students and campus clubs to provide orientation and training in the collection, handling and processing of activity funds.

ACCOUNTING ASSISTANT-ASB

~~This class differs from t~~The **Accounting Technician** ~~which~~ is an advanced level class assigned accounting work requiring in-depth knowledge concerning technical application of accounting and accounting control principles and oversees the work of account clerks.

The ~~Accounting Assistant — ASB differs from the~~ **Accounting Assistant** ~~which~~ is responsible for performing journey-level accounting and related clerical functions at a District level, requiring independent judgment over established functions such as accounts payable.

~~This job is distinguished from similar jobs by the following characteristics: Positions in the fiscal series ensure proper processing of accounting and budgeting data and provide necessary related financial information to management. They provide for timely delivery of checks, payroll, billing invoices and other accounting-related records, reports and materials and provide audit trails and assist in resolving accounting-related issues and disputes.~~

EDUCATION AND EXPERIENCE

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Coursework in bookkeeping or accounting is preferred. Two years of varied clerical accounting recordkeeping work, preferably including substantial public contact.

REQUIRED TESTING

Pre-employment testing and assessment is required in order to demonstrate the minimum qualifications for the position.

CERTIFICATES

None

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.

WORKING ENVIRONMENT

The usual and customary methods of performing the job functions require the physical demands outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Physical Demands: Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

CLASSIFIED

ACCOUNTING ASSISTANT-ASB

Seldom	stooping/bending, squatting/crouching, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	walking, standing, lifting 11-25 lbs. at waist height, carrying 11-25 lbs. up to 25 feet, lifting up to 10 lbs. overhead or at shoulder height, carrying up to 10 lbs. up to 25 feet
Occasionally/Frequently	handling/simple grasping, sitting, neck flexion/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability is required to communicate with students, staff, parents, and to respond to telephone calls, safety bells and emergencies. Vision ability is required to see near, distant, color, depth and peripherally.

ENVIRONMENTAL CONDITIONS

None

WORKING CONDITIONS

~~The usual and customary methods of performing the job's functions requires the following physical demands: some lifting, carrying, pushing and/or pulling; some climbing and balancing; some stooping, kneeling, crouching and/or crawling; significant reaching, handling, fingering and/or feeling. Generally the job requires 60% sitting, 10% walking and 30% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.~~

EDUCATION

~~High School Diploma or equivalent supplemented by course work in bookkeeping or accounting.~~

EXPERIENCE

~~Two years of financial record keeping experience.~~

REQUIRED TESTING

None Specified

CERTIFICATES AND LICENSES

None Specified

CONTINUING EDUCATION/TRAINING

None Specified

**ACCOUNTING ASSISTANT-ASB
CLEARANCES**

Criminal Justice/Fingerprint Clearance; TB Clearance

ACCOUNTING ASSISTANT-ASB

JOB SUMMARY

The Accounting Assistant-ASB maintains the Associated Student Body (ASB) financial books and records for a high school under the direction of an assigned administrator. The Accounting Assistant-ASB processes and records transactions, maintains ASB accounts, and prepares financial reports.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Assistant-ASB may perform any combination of the following:

- Establishes and maintains a wide variety of student body, club, and district fund accounts.
- Collects and deposits monies for various activities and sales. Prepares and maintains financial records and reports such as balances, income, expenditures, scholarships, sales, general ledger, transfers, receipts, cash, balances, and deposits.
- Enters financial data into accounting system, initiates queries, develops spreadsheets, generates a variety of reports and statements, and maintains automated records and files, ensuring accuracy of input and output of data.
- Compares and reconciles various fiscal statements, records and reports to assure accurate fund accounting; reviews and audits data, records and reports for accuracy and completeness; identifies, researches and resolves errors and discrepancies.
- Generates and prepares periodic and special accounting reports and financial statements.
- Prepares and processes purchase orders, invoices, reimbursements, and billings for payment and ensures purchases comply with established guidelines.
- Provides financial information and explains rules and procedures for fundraisers, events, and activities to staff, students and parents. Calculates, reviews and posts a variety of financial and statistical data. Oversees financial operation of student-related fund-raising activities such as ticket and event sales and provides guidance and supervision to students, volunteers, and staff.
- Prepares cash boxes used at events and accounts for all funds used and collected.
- Assists ASB director and principal in developing and maintaining budgets and following accounting policies and procedures and recommending improvements.
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Methods, procedures and terminology used in technical accounting work.
- Guidelines, practices, policies and procedures related to ASB accounting functions.
- Financial and statistical record-keeping techniques.
- Preparation of financial statements and comprehensive accounting reports.
- Use and processing of purchase orders, requisitions, receivables, invoices and related documents.
- Policies and objectives of assigned programs and activities.
- Preparation, review and control of assigned accounts.
- Data control procedures and data entry operations.
- Current, up-to-date office practices and procedures.

ACCOUNTING ASSISTANT-ASB

- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Perform a variety of technical accounting duties and functions.
- Maintain accurate financial and statistical records.
- Prepare comprehensive accounting reports and statements.
- Identify, investigate and resolve financial errors and discrepancies.
- Organize, safeguard, and comply with financial recordkeeping practices and policies.
- Monitor and audit revenue and expenditures.
- Process incoming cash, monies, deposits and receipts.
- Prepare data for records and reports.
- Interpret, apply and explain rules, regulations, policies and procedures.
- Process purchase orders and requisitions.
- Maintain, balance, adjust and reconcile accounts.
- Prepare invoices, billings and reimbursements for payment.
- Operate standard office equipment including a computer and assigned software.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Understand and resolve issues, complaints and problems.
- Work with minimal supervision and exercise appropriate judgment when making decisions.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Communicate with courtesy, diplomacy and tact.

DISTINGUISHING CHARACTERISTICS

The Accounting Assistant-ASB is distinguished from the Accounting Technician, the next level in the accounting/finance job family as follows:

The **Accounting Assistant – ASB** is a journey-level classification that performs responsible and varied accounting and related clerical functions requiring independent judgment over all student accounts and District funds as assigned and serves as the site expert for ASB fund accounting. Positions in this class work directly with students and campus clubs to provide orientation and training in the collection, handling and processing of activity funds.

The **Accounting Technician** is an advanced-level class assigned accounting work requiring in-depth knowledge concerning technical application of accounting and accounting control principles and oversees the work of account clerks.

The **Accounting Assistant** is responsible for performing journey-level accounting and related clerical functions at a District level, requiring independent judgment over established functions such as accounts payable.

ACCOUNTING ASSISTANT-ASB

EDUCATION AND EXPERIENCE

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Coursework in bookkeeping or accounting is preferred. Two years of varied clerical accounting recordkeeping work, preferably including substantial public contact.

REQUIRED TESTING

Pre-employment testing and assessment is required in order to demonstrate the minimum qualifications for the position.

CERTIFICATES

None

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.

WORKING ENVIRONMENT

The usual and customary methods of performing the job functions require the physical demands outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Physical Demands: Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

Seldom	stooping/bending, squatting/crouching, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	walking, standing, lifting 11-25 lbs. at waist height, carrying 11-25 lbs. up to 25 feet, lifting up to 10 lbs. overhead or at shoulder height, carrying up to 10 lbs. up to 25 feet
Occasionally/Frequently	handling/simple grasping, sitting, neck flexion/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability is required to communicate with students, staff, parents, and to respond to telephone calls, safety bells and emergencies. Vision ability is required to see near, distant, color, depth and peripherally.

ACCOUNTING ASSISTANT-ASB

ENVIRONMENTAL CONDITIONS

None

SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

VACANCY REPORT 12/13/18

Classified Personnel

10 current/pending vacancies in 6 different job classifications

SITE	SLOT	JOB TITLE	Hrs/Wk	FTE	STATUS
DO	AA010	Accounting Technician	40	1.00	Selection interview January 2019
TRANS	AF521	School Bus Driver	20	0.50	Selection interview December 2018
TRANS	AA498	School Bus Driver	20	0.50	Selection interview December 2018
TRANS	AA530	School Bus Driver	20	0.50	Selection interview December 2018
TRANS	AA495	School Bus Driver	20	0.50	Selection interview December 2018
DO	AA053	Executive Assistant	40	1.00	Selection interview January 2019
TP	AI308	Instructional Assistant SpEd Severe	30	0.75	Selection interview January 2019
ATP	AJ180	Instructional Assistant SpEd Severe	27.5	0.69	Selection interview January 2019
DO	AJ011	Director of Fiscal Services	40	1.00	Selection interview December 2018
DG	AA345	Health Technician	30	0.75	Selection interview January 2019