San Dieguito Union High School District PERSONNEL COMMISSION

Regular Meeting Agenda

3:30 P.M., November 12, 2019 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 November 12, 2019, Personnel Commission Regular Meeting.

Motion by _____, second by _____, to approve the agenda for the November 12, 2019 Personnel Commission Regular Meeting.

4. Approval of the Minutes for the October 15, 2019 Personnel Commission Regular Meeting.

Motion by_____, second by_____, to approve the minutes for the October 15, 2019 Personnel Commission Regular Meeting.

ACTION ITEMS (See Supplements)

- 5. ELIGIBILITY LISTS TO BE ESTABLISHED
 - A. Motion by _____, second by _____, to establish an Eligibility List for Administrative Assistant IV, SR 44, Open/Promotional, six months eligibility.
 - B. Motion by _____, second by _____, to establish an Eligibility List for Accounting Assistant, SR 40, Open/Promotional-Dual Certification, six months eligibility.
- 6. ELIGIBILITY LISTS TO BE APPROVED
 - A. Motion by _____, second by _____, to approve an Eligibility List for Custodian, SR-32, Open/Promotional-Dual Certification, eligibility from 10/11/19.
 - B. Motion by _____, second by _____, to approve an Eligibility List for Theater Technician, SR-41, Open/Promotional-Dual Certification, eligibility from 10/15/19.
 - C. Motion by _____, second by _____, to approve an Eligibility List for School Plant Supervisor High School, SR 41, Promotional Only, eligibility from 10/23/19.
 - D. Motion by _____, second by _____, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SpEd Severe - SR-34, Open/Promotional, eligibility from 10/16/19.
 - E. Motion by _____, second by _____, to approve an Eligibility List for Nutrition Services Assistant I SR-25, Open/Promotional-Dual Certification, eligibility from 10/29/19.

7. CLASSIFICIATION REVIEWS

A. Accounting Assistant and Accounting Technician

- 1. Motion by _____, second by _____, to revise the job description for Accounting Assistant as proposed.
- 2. Motion by _____, second by _____, to revise the job description for Accounting Technician as proposed.

- B. Director of Transportation
 - 1. Motion by _____, second by _____, to revise the Director of Transportation job description as proposed.
 - 2. Motion by _____, second by ____, to recommend to the SDUHSD Board of Education allocation of the classification of Director of Transportation to Range 4 of the Management Employees Salary Schedule.

DISCUSSION/INFORMATION ITEMS (See Supplements)

- 8. CLASSIFIED STAFF WORKING IN A BILINGUAL CAPACITY
- 9. STAFF COMMENTS ON PERSONNEL ACTIVITIES
 - A. Vacancy Report
 - B. Personnel List Report
 - C. Other
- 10. CORRESPONDENCE
- **11. 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
- 12. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, December 10, 2019, at 3:30 P.M. in the San Dieguito UHSD Board Room, 710 Encinitas Blvd., Encinitas, CA 92024.

13. ADJOURNMENT

San Dieguito Union High School District PERSONNEL COMMISSION

Regular Meeting Minutes

3:30 P.M., October 15, 2019 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 3:30 p.m. by JOHN BAIRD.
- 2. PLEDGE OF ALLEGIANCE Commissioner Baird led the pledge of allegiance.

Members in Attendance John Baird Jeff Charles Justin Cunningham

<u>Staff in Attendance</u> Susan Dixon, Director

- <u>Guests</u> Laura August Carmen Blum Sheila Graciano Debbie Johnson Margy Lara Dayne Tsuda Joel VanHooser
- APPROVAL OF THE AGENDA FOR THE OCTOBER 15, 2019, PERSONNEL COMMISSION REGULAR MEETING. It was moved by JUSTIN CUNNINGHAM seconded by JEFF CHARLES, to approve the agenda for the October 15, 2019, Personnel Commission Regular Meeting. Passed unanimously with 3 Ayes
- APPROVAL OF THE MINUTES FOR THE SEPTEMBER 10, 2019, PERSONNEL COMMISSION REGULAR MEETING. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve the minutes for the September 10, 2019, Personnel Commission Regular Meeting. *Passed unanimously with 3 Ayes*

ACTION ITEMS

- 5. ELIGIBILITY LISTS TO BE APPROVED
 - A. It was moved by JUSTIN CUNNINGHAM, seconded by JEFF CHARLES, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SP ED BEHAVIOR INTERVENTION SR-36, Open/Promotional, six months eligibility from 9/11/19. *Passed with 3 Ayes*

- B. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SP ED NON-SEVERE, SR-34, Open/Promotional-Dual Certification, six months eligibility from 9/12/19. Passed with 3 Ayes
- C. It was moved by JUSTIN CUNNINGHAM, seconded by JEFF CHARLES, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SP ED SEVERE, SR-36, Open/Promotional, six months eligibility from 9/12/19. Passed with 3 Ayes
- 6, ELIGIBILITY LISTS TO BE ESTABLISHED
 - A. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for GROUNDS SUPERVISOR – Supervisory Salary Range 6, Open/Promotional, six months eligibility.

Passed with 3 Ayes

- B. It was moved by JUSTIN CUNNINGHAM, seconded by JEFF CHARLES, to establish an Eligibility List for School Plant Supervisor High School, SR-41, Promotional Only, six months eligibility. *Passed with 3 Ayes*
- C. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for Computer Support Technician, SR-51, Open/Promotional-Dual Certification, six months eligibility.

Passed with 3 Ayes

7. CLASSIFICATION REVIEW

A. Computer Support Technician

- 1. It was moved by JUSTIN CUNNINGHAM, seconded by JEFF CHARLES, to retitle the classification of Computer Support Technician to Information Technology (IT) Support Technician.
- It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to revise the class description of Computer Support Technician/newly titled Information Technology (IT) Support Technician as proposed.

Both passed unanimously with 3 Ayes.

DISCUSSION/INFORMATION ITEMS (See Supplements)

- 8. STAFF COMMENTS ON PERSONNEL ACTIVITIES
 - A. Vacancy Report –
 - B. Personnel List Report –
 - C. Other
 - 9. CORRESPONDENCE None
 - **10. 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 -

Laura August: Spoke on the issue of classified employees who use their bilingual skills on a regular basis without compensation.

Carmen Blum: Spoke on the issue of classified employees who use their bilingual skills on a regular basis without compensation. Ms. Blum requested that a study be conducted to address the issue.

In order to adhere to the provisions of the Brown Act, discussion was limited. Commissioner Baird requested that the topic of Bilingual Pay be placed as a discussion item on the next agenda.

11. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, November 12, 2019, at 3:30 P.M. at San Dieguito UHSD office, 710 Encinitas Boulevard, Encinitas, CA 92024.

12. CLOSED SESSION

At 4:26 PM the commission went into closed session to evaluate the Director of Classified Personnel. No action was taken.

13. ADJOURNED – 4:45 PM

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

*Effective: 7-10-19 *Expiration: 1-10-20 Effective: 10-11-19 Expiration: 4-11-20

Applicant ID	Rank
3559691	1
4491308	2*
3394319	3
3000647	4
5478573	5

S. Dixon

Custodian

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

Theater Technician

*Effective: 7/18/2019 *Expiration: 1/18/2020 Effective: 10/16/2019 Expiration: 4/16/2020

Rank	Applicant ID
1	5486623
1	3548589
2	*3116764
3	5506795
4	5481929
5	5482803
5	*1085076

San Dieguito Union High School District Personnel Commissioin Eligibility List Promotional

Effective: 10/24/19 Expiration: 04/24/20

School Plant Supervisor--High School

Applicant ID	Rank
5873738	1
2834297	2
2543283	3
2691942	4
2946104	5
2606967	6

San Dieguito Union High School District Personnel Commission Eligibility List - Continuous Filing Open/Promotional

*Eff: 7-25-19 *Exp: 1/25/20 Eff: 10/16/19 Exp: 4/16/20

Instr Asst SpEd-Severe

	Rank	Applicant ID	
Promo	1	1240762	
	2	2827325	
Open	1	*2867275	

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

Nutrition Services Assistant I

Rank	Applicant ID	Expiration	
1	4427424	1/30/2020	Requesting extension; original expiration was 10/31/19
1	2668488	4/29/2020	
2	4521261	2/20/2020	
3	5475885	4/29/2020	

San Dieguito Union High School District

Board of Trustees Joyce Dalessandro Kristin Gibson Beth Hergesheimer Melisse Mossy Maureen "Mo" Muir

Superintendent Robert A. Haley, Ed.D.

710 Encinitas Boulevard, Encinitas, CA 92024 Telephone (760) 753-6491 Fax (760) 943-3522 www.sduhsd.net Classified Personnel Commission John Baird, Commissioner Jeffery Charles, Commissioner Justin Cunningham, Commissioner Susan Dixon, Director

Classification Review Report Classifications Accounting Assistant and Accounting Technician **Classification Type** Classified Salary Range 40 & 42 **Prepared By** Barbara Bass, Human Resources Analyst Susan Dixon, Director, Classified Personnel Submission to Classification Advisory Committee October 29, 2019 Submission to Personnel Commission November 12, 2019 Agenda Item **Class Description Update**

Background Information

Personnel Commission staff met with the Director of Fiscal Services to update the Accounting Assistant and Accounting Technician job descriptions. Both job descriptions were last updated July 1, 2001. The format and language used at the time is now outdated. The Accounting Assistant is the entry-level classification in the Accounting Department, followed by the Accounting Technician. The job descriptions were updated to clearly describe the essential functions, knowledge, abilities, and minimum qualifications required.

Sources of Information

Dawn Campbell, Director of Fiscal Services Comparable districts in San Diego County

Salary Compensation Review

A review of salary rates of comparable classifications within the designated comparison districts is below:

Accounting Assistant				
District	Salary Range	Job Title	Minimum	Maximum
Escondido USD	33	Accounting Technician I	\$17.91	\$22.86
Grossmont UHSD	42	Sr. Account Clerk	\$20.26	\$25.72
San Diego COE	42	Account Clerk II	\$20.83	\$26.59
Sweetwater UHSD	53	Accounting Assistant	\$21.67	\$26.66
Vista USD	47	Accounting Assistant	\$19.56	\$26.30
	AVERAGE		\$20.05	\$25.63
San Dieguito UHSD	40	Accounting Assistant	\$21.07	\$28.20

Accounting Technicia	an			
District	Salary Range	Job Title	Minimum	Maximum
Carlsbad USD	21	Accounting Technician	\$20.82	\$25.35
Escondido USD	38	Accounting Technician II	\$20.27	\$25.87
Grossmont UHSD	45	Accounting Technician	\$21.73	\$27.68
Oceanside USD	30	Accounting Technician	\$22.30	\$28.28
Ramona USD	25	Accounting Technician II	\$17.23	\$22.06
San Marcos USD	63	Accounting Technician	\$21.27	\$27.14
Vista USD	52	Accounting Technician	\$22.13	\$29.76
	AVERAGE		\$20.82	\$26.59
SDUHSD	42	Accounting Technician	\$22.08	\$29.65

Recommendation

It is recommended that the Accounting Assistant and Accounting Technician job descriptions be revised as proposed. Based upon comparison data, there is no recommendation for salary reallocation at this time.

Vote by Committee Members:

Vote	Member	Vote	Member
Yes	Matt Colwell, CSEA	Yes	Marley Nelms, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin
Yes	Margy Lara, CSEA		

ACCOUNTING ASSISTANT

OVERALL JOB SUMMARYPURPOSE STATEMENT

The job of Accounting Assistant is done for the purpose of performing various financial activities for the Finance Department that require accurately processing, recording and/or updating fiscal information in accordance with established financial practices. The Accounting Assistant processes and monitors payments and expenditures, ensures finances are accurate and current, and vendors are paid within established timelines. The Accounting Assistant follows district, state, and federal regulations pertaining to fiscal and accounting requirements.

DISTINGUISHING CHARACTERISTICS

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 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. The Accounting Assistant is a journey-level classification that performs responsible and varied accounting and related clerical functions requiring independent judgment over District accounts and funds as assigned such as accounts payable. Positions in this class work directly with District department personnel to provide orientation in the collection, handling and processing of District funds. This class differs from the Accounting Technician which is an advanced level class assigned accounting control principles and oversees the work of account clerks. The Accounting Assistant differs from the Accounting Assistant - ASB which is responsible for performing journey-level accounting and related clerical functions at a school site level and works directly with students and accounting and related clerical functions at a school site level and works directly with students and accounting and related clerical functions at a school site level and works directly with students and campus clubs to provide orientation and training in the collection, handling and processing of activity funds.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Assistant may perform any combination of the following:

- Prepares and processes purchase orders, invoices, reimbursements, and billings for payment.
- Verifies accuracy of charges, account numbers, invoices and other documents.
- Reviews invoices for appropriate documentation and approval prior to financial recognition and payment.
- 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.

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CLASSIFIED

ACCOUNTING ASSISTANT

- Reconciles cash and account balances as assigned (e.g., open purchase orders, accounts, vendor statements).
- Researches discrepancies of financial information and documentation (e.g., purchase orders, requisitions).
- Maintains a variety of fiscal information, files and records (e.g., accounts payable, accounts receivable, purchase orders, contracts).
- Monitors fund balances of assigned programs and related financial activity (e.g., open purchase orders) to ensure allocations are accurate and expenses are within budget limits.
- Performs a variety of clerical duties, such as data entry, filing, answering the telephone, composing written communications, and preparing reports.
- Follows district, state, and federal regulations pertaining to fiscal and accounting requirements.
- Provides information and explains accounting policies and procedures to District personnel, agencies, and vendors.
- Assist in year--end closing for their area of responsibility.
- Process monthly expense and travel reimbursements in accordance with payment policies.
- Assists Accounting staff in the completion of their work assignments.
- Performs other job-related duties as assigned.

OTHER FUNCTIONS

- Assists other personnelAccounting staff for the purpose of supporting them in the completion of their work assignments.
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE is required to perform basic math including calculation of fractions, percents and/or ratios; 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.

SKILLS are required to perform single technical tasks with a potential need to 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; performing standard bookkeeping; preparing and maintaining accurate records; and using pertinent software applications.

ABILITY 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 and similar 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

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CLASSIFIED

ACCOUNTING ASSISTANT

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 to significant; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: communicating with diverse groups; meeting deadlines and schedules; and working with detailed information/data.

KNOWLEDGE OF:

- Basic accounting and record-keeping practices.
- Use and processing of purchase orders, requisitions, receivables, invoices and related transactions.
- District, state, and federal regulations pertaining to fiscal and accounting requirements.
- Arithmetic computations used in accounting.
- Formulas and functions used in electronic spreadsheets.
- Word processing, electronic spreadsheets, accounting systems, electronic calendars and email applications.
- Current, up-to-date officeAccounting practices and procedures.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Accurately process purchase orders, requisitions, receivables, invoices and related transactions.
- Prepare written communications.
- Identify, investigate and resolve financial errors and discrepancies.
- Perform record keeping and general clerical functions.
- Prepare data for records and reports.
- Follow district, state and federal regulations pertaining to fiscal and accounting requirements.
- Maintain, balance, adjust and reconcile accounts.
- Monitor fund balances of assigned programs and related financial activity.
- Prepare invoices, billings and reimbursements for payment.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Respond effectively to requests and inquiries from staff and external parties.
- Communicate effectively both orally and in writing.
- Use current, up-to-date computer-based applications including accounting systems, word
 processing, databases, spreadsheets, calendars and e-mail to perform job duties efficiently.
- Establish and maintain cooperative and effective working relationships with others.
- Handle confidential information in a discreet, professional manner.

EDUCATION

High School Diploma or equivalent. supplemented by cCourses in bookkeeping and accounting preferred but not required. Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Courses in accounting preferred but not required.

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EXPERIENCE

Two years of increasingly responsible experience in accounting, cash handling or similar job role. financial or statistical record-keeping-accounts payable or similar job role in processing financial transactions and maintaining financial records...

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: Positions in the fiscal series ensure proper processing of accounting job family process accounting and budgeting data and provide necessary 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. – performs responsible and varied accounting and related clerical functions requiring independent judgment over District accounts and funds as assigned such as accounts payable. Positions in this class work directly with District department personnel to provide orientation in the collection, handling and processing of District funds.

This class differs from twhich is an advanced level class work oversees the work of account clerks. s Accounting Assistant differs from the which is responsible for performing journey-level accounting and related clerical functions at a school site level andprovide orientation and training in the collection, handling and processing of activity funds

DISTINGUISHING CHARACTERISTICS

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.

Differentiation between the Accounting Assistant, Accounting Assistant-ASB, and the Accounting Technician, are distinguished 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.

RESPONSIBILITY

San Dieguito Union High School District Adopted: May 7, 1987 Revised: July 1, 2001 Revised: November 12, 2019 Page 4 of 6

CLASSIFIED

ACCOUNTING ASSISTANT

Responsibilities include: working under limited supervision; providing information and/or advising other persons; and operating within a defined budget and/or financial guidelines. Utilization of some 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.

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 80% sitting, 10% walking and 10% 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 courses in bookkeeping and accounting.

EXPERIENCE

Two years of increasingly responsible experience in financial or statistical record-keeping.

REQUIRED TESTING

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

None Specified

CERTIFICATEIONS AND LICENSES

None Specified

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

None Specified

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.

San Dieguito Union High School District Adopted: May 7, 1987 Revised: July 1, 2001 Revised: November 12, 2019 Page 5 of 6

CLASSIFIED

ACCOUNTING ASSISTANT

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.

ENVIRONMENTAL CONDITIONS
None

OTHER REQUIREMENTS

Criminal Justice/Fingerprint Clearance; TB Clearance

JOB SUMMARY

The Accounting Assistant processes and monitors payments and expenditures, ensures finances are accurate and current and vendors are paid within established time limits. The Accounting Assistant follows district, state and federal regulations pertaining to fiscal and accounting requirements.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Assistant may perform any combination of the following:

- Prepares and processes purchase orders, invoices, reimbursements, and billings for payment.
- Verifies accuracy of charges, account numbers, invoices and other documents.
- Reviews invoices for appropriate documentation and approval prior to financial recognition and payment.
- 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.
- Reconciles cash and account balances as assigned (e.g., open purchase orders, accounts, vendor statements).
- Researches discrepancies of financial information and documentation (e.g., purchase orders, requisitions).
- Maintains a variety of fiscal information, files and records (e.g., accounts payable, accounts receivable, purchase orders, contracts).
- Monitors fund balances of assigned programs and related financial activity (e.g., open purchase orders) to ensure allocations are accurate and expenses are within budget limits.
- Performs a variety of clerical duties, such as data entry, filing, answering the telephone, composing written communications, and preparing reports.
- Provides information and explains accounting policies and procedures to District personnel, agencies, and vendors.
- Follows district, state, and federal regulations with respect to fiscal/accounting requirements.
- Assist in year-end closing for area of responsibility.
- Process monthly expense and travel reimbursements in accordance with payment policies.
- Assists Accounting staff in the completion of their work assignments.
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Basic accounting and record-keeping practices.
- Use and processing of purchase orders, requisitions, receivables, invoices and related transactions.

- District, state, and federal regulations pertaining to fiscal and accounting requirements.
- Arithmetic computations used in accounting.
- Formulas and functions used in electronic spreadsheets.
- Word processing, electronic spreadsheets, accounting systems, electronic calendar and email applications.
- Current, up-to-date Accounting practices and procedures.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Accurately process purchase orders, requisitions, receivables, invoices and related transactions.
- Prepare written communications.
- Identify, investigate and resolve financial errors and discrepancies.
- Perform record keeping and general clerical functions.
- Prepare data for records and reports.
- Follow district, state and federal regulations pertaining to fiscal and accounting requirements.
- Maintain, balance, adjust and reconcile accounts.
- Monitor fund balances of assigned programs and related financial activity.
- Prepare invoices, billings and reimbursements for payment.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Respond effectively to requests and inquiries from staff and external parties.
- Communicate effectively both orally and in writing.
- Use current, up-to-date computer-based applications including accounting systems, word processing, databases, spreadsheets, calendars and e-mail to perform job duties efficiently.
- Establish and maintain cooperative and effective working relationships with others.
- Handle confidential information in a discreet, professional manner.
- Complete tasks thoroughly, accurately and with attention to detail.

EDUCATION

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Courses in accounting preferred but not required.

EXPERIENCE

Two years experience in accounting, cash handling or similar job role.

DISTINGUISHING CHARACTERISTICS

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.

Differentiation between the Accounting Assistant, Accounting Assistant-ASB, and the Accounting Technician, are distinguished as follows:

The **Accounting Assistant – ASB** performs responsible and varied ASB-related accounting and clerical functions at a high school.

The **Accounting Technician** is responsible for processing, recording and auditing various transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements.

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,
Occasionally/Frequently	carrying up to 10 lbs. up to 25 feet handling/simple grasping, sitting, neck flexion/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

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

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ENVIRONMENTAL CONDITIONS

None

ACCOUNTING TECHNICIAN

OVERALL-JOB SUMMARY PURPOSE STATEMENT

The job of Accounting Technician is done for the purpose of providing financial support to assigned department and/or program such as Special Projects, Facilities, Food Services and/or Transportation, including ensuring the establishment and maintenance of a comprehensive budgeting and accounting system, assisting in the preparation of the annual budget, and processing financial information in accordance with established accounting requirements. performs a variety of technical accounting duties such as processing, recording and auditing various accounts payable and receivable transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements. The Accounting Technician follows district, state and federal regulations pertaining to fiscal and accounting requirements.

DISTINGUISHING CHARACTERISTICS

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 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. The Accounting Technician is an advanced-level classification that performs accounting activities requiring in-depth knowledge concerning technical application of accounting and accounting control principles. Positions in this class operate with more freedom to act and are typically assigned complete responsibility for specific accounting functions within a department or major programs. This class differs from the Accounting Assistant class which performs accounting and related clerical of above average difficulty requiring independent judgment over an established function such as accounts payable. The Accounting Technician differs from the Accounting Specialist which has complete responsibility for specific accounting Assistants, and serves as a technical advisor to the Controller on financial system development and implementation.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Technician may perform any combination of the following:

Performs record keeping and general clerical functions (e.g. scheduling, copying, faxing, etc.) for the purpose of supporting departmental/program operations.

Prepares a variety of documents (e.g. reports, purchase orders, invoices, memos, letters, fund status, expense reports, etc.) for the purpose of documenting activities in accordance with financial/legal requirements, providing written reference and/or conveying information.

Processes a variety of fiscal information-transactions (e.g., -warrants, deposits, accounts receivables, refunds, fees, purchase orders, requisitions, invoices, etc.) for the purpose of updating information,

completing financial transactions, ensuring timely and accurate submissions, and/or ensuring and compliance with accounting requirements.

- Reconciles cash and/or account balances (e.g., bank statements, expenditures to budget, various funds, etc.) for the purpose of maintaining accurate balances and complying with accounting practices).
- Responds to inquires, including phone, mail and walk-ins (e.g. district staff, vendors, district and site personnel, contractors, community representatives, local, state and/or federal agency personnel, etc.) for the purpose of resolving issues, providing requested information and/or referring to appropriate department personnel.
- Maintains a variety of fiscal information, files and records (e.g., invoices, requisitions, accounts payable, purchase orders, applications.), etc.) for the purpose of ensuring comprehensive and accurate data compliance with prescribed accounting systems and generally accepted principles of accounting.
- Assists various parties (e.g. contractors, public agency personnel, etc.) for the purpose of providing required information and/or coordinating work activities toward common objectives.
- Monitors fund balances and day-to-day expenditures for the purpose of ensuring that to ensure allocations are accurate, related revenues are generated, expenses are within budget and fiscal practices are followed.
- Coordinates work activities with various parties (e.g. district and school staff, vendors, contractors, auditors, public agency personnel, etc.) for the purpose of providing required information and/or coordinating work activities toward common objectives.
- Researches financial information and/or documentation (e.g. order discrepancies, requisitions, liens, policies, etc.) for the purpose of ensuring accuracy and adhering to procedures prior to processing for payment. 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.
- Researches discrepancies of financial information and/or documentation (e.g., purchase orders, requisitions) to ensure discrepancies are resolved prior to processing payments.
- Evaluates financial information and reporting requirements for the purpose of to designing and implementing appropriate accounting and reporting systems from the creation of a Chart of Accounts forward through periodic and annual financial reporting.
- Analyzes data of a statistical and/or financial nature (e.g., projections, financial statistics, etc.) for the purpose of and preparing prepares recommendations and/or reports for administrative review and action.
- Assist in the preparation, administration, and auditing of categorical accounts.
- Interprets and implements district, state and federal regulations pertaining to fiscal and accounting requirements.
- Provides information and explains accounting policies and procedures to District personnel, agencies, and vendors.
- Provides support to the Accounting Assistant-ASB school employees.
- Administers revolving cash accounts.

- Perform budget and journal entries.
- Informs public and outside agencies regarding a variety of procedures and program requirements for the purpose of providing the necessary information for completing transactions, taking appropriate actions and/or complying with established fiscal guidelines.
- Oversees various work activities as assigned (e.g.-., purchasing, reporting requirements, etc.) for the purpose of ensuring timely and accurate submission of information with appropriate District departments, customers, vendors, public agencies, etc.

OTHER FUNCTIONS

- Performs other job-related duties as assigned.
- Attends meetings as required for the purpose of receiving and/or conveying information.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE OF:

- Principles, practices and procedures involved in accounting transactions.
- Preparation of financial statements and comprehensive accounting reports
- Preparation, review and control of assigned accounts.
- Use and processing of purchase orders, requisitions, receivables, invoices and related documents.
- District, state and federal regulations pertaining to fiscal and accounting requirements.
- Arithmetic computations used in accounting.
- Current, up-to-date Accounting practices and procedures.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Perform a variety of technical accounting duties..
- Maintain accurate financial and statistical records.
- Prepare comprehensive accounting reports, statements and written communications.
- Identify, investigate and resolve financial errors and discrepancies.
- Monitor and audit revenue and expenditures.
- Process incoming cash, monies, deposits and receipts.
- Prepare data for records and reports.
- Interpret and implement district, state and federal regulations pertaining to fiscal and accounting requirements.
- Review and process purchase orders and requisitions.
- Maintain, balance, adjust and reconcile accounts.
- Prepare invoices, billings and reimbursements for payment.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Understand and resolve issues, complaints and problems.
- Exercise appropriate judgment when making decisions.
- Respond effectively to requests and inquiries from District employees.

- Communicate effectively both orally and in writing.
- Use current, up-to-date computer-based applications including accounting systems, word processing, databases, spreadsheets, calendars and e-mail to perform job duties efficiently.
- Establish and maintain cooperative and effective working relationships with others.
- Handle confidential information in a discreet, professional manner.
- Complete tasks thoroughly, accurately and with attention to detail.

KNOWLEDGE 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: accounting/bookkeeping principles.

SKILLS are required to perform multiple technical tasks with a potential need to 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; performing accounting procedures; preparing and maintaining accurate records; and using pertinent software applications.

ABILITY 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 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 diversity of individuals; 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 to significant; and with equipment it is limited to moderate. 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; working with minimal supervision; working with constant interruptions and working with detailed information/data.

RESPONSIBILITY

Responsibilities include: working under limited supervision; directing other persons within a department, large work unit and/or across several small work units; 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.

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 85% sitting, 10% walking and 5% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.

EDUCATION AND EXPERIENCE

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Courses in accounting preferred but not required. Three years of increasingly responsible experience in Accounting, including Accounts Payable, Accounts Receivable, and General Ledger is required.

DISTINGUISHING CHARACTERISTICS

The **Accounting Technician** is responsible for processing, recording and auditing various transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements.

Differentiation between Accounting Technician and positions above and below are distinguished as follows:

The **Accounting Specialist** oversees and coordinates the work of the Accounting Assistant(s). The Accounting Specialist performs complex accounting functions requiring in-depth knowledge of accounting and control principles.

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.

The **Accounting Assistant – ASB** performs responsible and varied ASB-related accounting and clerical functions at a high school.

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.

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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.

ENVIRONMENTAL CONDITIONS

None

EDUCATION

High School Diploma or equivalent supplemented by college-level courses in bookkeeping and accounting.

EXPERIENCE

Three years of increasingly responsible experience in financial or statstical recordkeeping.

REQUIRED TESTING

None Specified

CERTIFICATES AND LICENSES

None Specified

CONTINUING EDUCATION/TRAINING

None Specified

OTHER REQUIREMENTS

Criminal Justice/Fingerprint Clearance; TB Clearance

JOB SUMMARY

The Accounting Technician performs a variety of technical accounting duties such as processing, recording and auditing various accounts payable and receivable transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements. The Accounting Technician follows district, state and federal regulations pertaining to fiscal and accounting requirements.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accounting Technician may perform any combination of the following:

- Processes a variety of fiscal transactions (e.g., warrants, deposits, accounts receivables, refunds, fees, purchase orders, requisitions, invoices).
- Reconciles cash and/or account balances (e.g., bank statements, expenditures to budget, various funds).
- Maintains a variety of fiscal information, files and records (e.g., invoices, requisitions, accounts payable, purchase orders, applications).
- Monitors fund balances and day-to-day expenditures to ensure allocations are accurate, related revenues are generated, expenses are within budget and fiscal practices are followed.
- Enters financial data into accounting system, initiates queries, develops spreadsheets, prepares reports (e.g., monthly Board reports) and statements, and maintains automated records and files.
- Compares and reconciles various fiscal statements, records and reports to assure accurate fund accounting.
- Reviews and audits data, payments, travel requests, reimbursements, records and reports for accuracy and completeness.
- Identifies, researches and resolves errors and discrepancies.
- Evaluates financial information and reporting requirements to design and implement appropriate
 accounting and reporting systems from the creation of a Chart of Accounts forward through periodic
 and annual financial reporting.
- Analyzes data of a statistical and/or financial nature (e.g., projections, financial statistics) and prepares recommendations and/or reports for administrative review and action.
- Assist in the preparation, administration, and auditing of categorical accounts.
- Interprets and implements district, state and federal regulations pertaining to fiscal and accounting requirements.
- Provides information and explains accounting policies and procedures to District personnel, agencies, and vendors.
- Provides support to the Accounting Assistant-ASB school employees.
- Administers revolving cash accounts.
- Perform budget and journal entries.
- Oversees various work activities as assigned (e.g., purchasing, reporting requirements).
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Principles, practices and procedures involved in accounting transactions.
- Preparation of financial statements and comprehensive accounting reports
- Preparation, review and control of assigned accounts.
- Use and processing of purchase orders, requisitions, receivables, invoices and related documents.
- District, state and federal regulations pertaining to fiscal and accounting requirements..
- Arithmetic computations used in accounting.
- Current, up-to-date Accounting practices and procedures.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Perform a variety of technical accounting duties..
- Maintain accurate financial and statistical records.
- Prepare comprehensive accounting reports, statements and written communications.
- Identify, investigate and resolve financial errors and discrepancies.
- Monitor and audit revenue and expenditures.
- Process incoming cash, monies, deposits and receipts.
- Prepare data for records and reports.
- Interpret and implement district, state and federal regulations pertaining to fiscal and accounting requirements.
- Review and process purchase orders and requisitions.
- Maintain, balance, adjust and reconcile accounts.
- Prepare invoices, billings and reimbursements for payment.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Understand and resolve issues, complaints and problems.
- Exercise appropriate judgment when making decisions.
- Respond effectively to requests and inquiries from District employees.
- Communicate effectively both orally and in writing.
- Use current, up-to-date computer-based applications including accounting systems, word processing, databases, spreadsheets, calendars and e-mail to perform job duties efficiently.
- Establish and maintain cooperative and effective working relationships with others.
- Handle confidential information in a discreet, professional manner.
- Complete tasks thoroughly, accurately and with attention to detail.

EDUCATION AND EXPERIENCE

Job-related education necessary to perform the essential job duties is typically consistent with graduation from high school or equivalent. Courses in accounting preferred but not required. Three years of increasingly responsible experience in Accounting, including Accounts Payable, Accounts Receivable, and General Ledger is required.

DISTINGUISHING CHARACTERISTICS

The **Accounting Technician** is responsible for processing, recording and auditing various transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements.

Differentiation between Accounting Technician and positions above and below are distinguished as follows:

The **Accounting Specialist** oversees and coordinates the work of the Accounting Assistant(s). The Accounting Specialist performs complex accounting functions requiring in-depth knowledge of accounting and control principles.

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.

The **Accounting Assistant – ASB** performs responsible and varied ASB-related accounting and clerical functions at a high school.

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.

ENVIRONMENTAL CONDITIONS None

San Dieguito Union High School District

Board of Trustees Joyce Dalessandro Kristin Gibson Beth Hergesheimer Melisse Mossy Maureen "Mo" Muir

Superintendent Robert A. Haley, Ed.D.

710 Encinitas Boulevard, Encinitas, CA 92024 Telephone (760) 753-6491 Fax (760) 943-3522 www.sduhsd.net Classified Personnel Commission John Baird, Commissioner Jeffery Charles, Commissioner Justin Cunningham, Commissioner Susan Dixon, Director

Classification Review Report Classification **Director of Transportation Classification Type Classified Management** Salary Range 4 Prepared By Barbara Bass, Human Resources Analyst Susan Dixon, Director, Classified Personnel Submission to Classification Advisory Committee October 29, 2019 Submission to Personnel Commission November 12, 2019 **Class Description Revision** Agenda Item

Background Information

Upon the retirement of the Director of Maintenance, Operations & Transportation, District administration reviewed the managerial responsibilities for both the maintenance and transportation departments.

Prior to 2013, the District had established and maintained a classification specific to Director of Transportation. However, in June of 2013, the Personnel Commission established a classification of Director of Maintenance, Operations and Transportation due to organizational changes.

Current needs are such that a decision was made to split the responsibilities related to the oversight of these two distinct programs. The Associate Superintendent of Business Services met with Personnel Commission staff to review the changes and discuss the role of the incumbent who will manage transportation. Based on this information, the previously utilized classification description for Director of Transportation has been updated and is attached for your review.

Sources of Information

Dan Love, Director of Maintenance, Operations and Transportation (now retired) Tina Douglas, Associate Superintendent, Business Services Comparable districts in San Diego County

Recommendation

It is recommended that the Director of Transportation job description be revised as proposed. Based upon comparison data, it is recommended that the Director of Transportation be allocated to its former Range 4 allocation. This is where it was previously placed before the maintenance, grounds and custodial responsibilities were added.

A salary survey of comparable positions from our comparison agencies was conducted. SDUHSD management salaries include the cost of benefits while our comparison districts do not include the cost of benefits. Although the rate of pay for SDUHSD (after adjusting for benefits) is slightly less than the average rate of pay of our comparison districts, when factoring the size of the transportation program the director will manage compared to others, allocation at Range 4 seems appropriate.

District		Salary Range			Minimum	Maximum
Escondido UHSD		26			102,011	115,417
Grossmont UHSD			\$93,971	\$112,206		
Oceanside USD		18			\$116,942	\$122,046
Poway USD		21			\$114,540	\$134,748
Sweetwater UHSD		6			\$99,856	\$118,875
Vista USD		24			\$102,428	\$115,889
		Average			\$104,958	\$119,863
San Dieguito	Directo	a of Turney out of the s	Duran and A	as appears on Schedule		\$127,058
UHSD	Director of Transportation		Proposed 4	Net salary formula pre	······································	<u></u>

flex dollar change

\$101,547

\$117,443

A review of salary rates of comparable classifications within the designated comparison districts is below:

Vote by Committee Members:

Vote	Member	Vote	Member
NA	Matt Colwell, CSEA	Yes	Marley Nelms, Admin
NA	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin
NA	Margy Lara, CSEA		

OVERALL JOB STATEMENTSJOB SUMMARY

Under the direction of the Executive Director of Operations, the job of Director of Transportation is done for the purpose/s of planning, organizing and directing the district's transportation services for multiple local school districts; ensuring that departmental work goals are met; services are provided in an efficient and effective manner; ensuring that staff utilizes appropriate procedures and safe practices; providing overall coverage of the required transportation services; and ensuring optimal utilization of personnel and other resources.

The Director of Transportation plans, organizes and directs transportation operations, programs and services. The incumbent ensures that the Transportation department provides safe and efficient services are achieved within budget, meet the needs of the District, and comply with regulatory requirements.

ESSENTIAL JOB FUNCTIONSREPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

- Plan, organize, and direct the District's student transportation program (e.g., regular home-to-school, special education home-to-school, extracurricular).
- Direct the routing, scheduling and supervision of School Bus Drivers to ensure smooth operation of school bus routes for regular and special education.
- Conduct short and long-range planning activities, including cost analysis and recommendations for improving transportation services (e.g., schedules, routes, fleet replacement, staffing, emergency response plans, vehicle maintenance and replacement plans).
- Keep records of operations and costs in conformance with District policies and state regulations and submit reports as needed regarding the transportation program.
- Prepare and oversee Transportation Dept. budget, monitor fund balances, and ensure expenses are within budget limits and fiscal practices are followed.
- Supervise and evaluate the performance of assigned staff, interview and select employees, recommend disciplinary actions, arrange for staff training as needed.
- Review incident reports, conduct accident investigations and take appropriate action.
- Oversee transportation maintenance activities, including the maintenance, repair, servicing and cleaning of school busses and other District-owned vehicles.
- Oversee staff training (e.g., safety, new bus driver training, requalifications, and routine inservices).
- Meets with administrators to plan scheduling, discuss policies and procedures, exchange information and resolve operational and logistics issues.
- Advise and recommend District management staff on transportation-related matters; interpret transportation-related laws and policies for school personnel, parents, and others.
- Confer with school administrators, parents, insurance representatives, agencies, and citizens regarding major transportation-related concerns, and works toward consensus to resolve concerns.
- Ensure Department compliance with applicable local, state, and federal regulations, and District policies and keeps current on knowledge of legislation, legal codes, and requirements.
- Participate in on-going departmental and District labor relations sessions.
- Research a variety of information to develop improved or new programs and services, ensure compliance with regulations, plan, take action or respond to requests for information.

- Collaborates with others (e.g., District personnel, community) to implement, maintain, or improve transportation services.
- Develops long and short range transportation plans/programs (e.g. Transportation Cooperative, transportation budget recommendations, emergency response plans, boundary changes) for the purpose of ensuring that the resources are effectively utilized.
- Evaluates personnel for the purpose of ensuring that standards are achieved and performance is maximized.
- Complies financial, statistical and technical reports related to transportation cooperative for the purpose of providing informat
- ion to the boards, special education directors, business managers and superintendents of the individual districts.
- Prepares various documents (e.g., budgets, requisitions, time studies, productivity, grants, proposals, evaluation reports, contract specifications,) for the purpose of providing necessary information to State/Federal agencies and appropriate district personnel and/or developing contracts specifications.
- Presents various programs (e.g., safety, driver instructions, accident prevention) for the purpose of informing staff of appropriate procedures and safe practices.
- Attends various meetings (e.g., staff meetings, training, hearings, safety, Transportation Directors Council, professional associations) for the purpose of addressing operational concerns, receiving and conveying information relating to professional requirements, new products and technology and/or networking with other professionals.
- Recommends new hires, promotions, termination and transfers for the purpose of maintaining staffing needs and productivity of the work force.
- Represents the district in meetings with other districts and outside agencies for the purpose of relating and/or receiving information.
- Researches new products, laws, regulations, etc. for the purpose of ensuring transportation services are provided in accordance with established standards and recommending actions such as purchases, procedures, etc., that are required to maintain services.
- Supervises transportation service activities (e.g., dispatching, scheduling, vehicle maintenance, route development) for the purpose of ensuring that the department provides services in a safe and efficient manner and in accordance with established requirements.
- Investigates accidents and incidents involving busses and/or passengers for the purpose of determining corrective actions and addressing established regulatory requirements.

- Performs a variety of personnel functions (e.g., interviewing, hiring, evaluating, training, staffing, scheduling, motivating, supervising) for the purpose of providing an efficient transportation services operation throughout the district.
- Maintains a variety of annual and electronic files and/or records for the purpose of documenting activities, providing reliable information, and complying with district, State and Federal requirements.
- Monitors/coordinates scheduling of field trip transportation and communicates staff responsibilities to various groups (e.g., school administrators, department staff, union representatives) for the purpose of assuring that field trip responsibilities are completed in an effective and efficient manner.
- Assists other personnel as may be required for the purpose of supporting them in the completion of their work activities.

JOB REQUIREMENTS-: MINIMUM QUALIFICATIONS

SKILLS, KNOWLEDGE AND ABILITIES

SKILLS are required to perform multiple, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: to administer personnel policies and practices; apply pertinent codes, policies, regulations and/or laws; communicate with persons of varied cultural and educational backgrounds; operate standard office equipment including utilizing pertinent software applications; perform standard bookkeeping/accounting procedures; plan and manage projects; prepare and maintain accurate records; prepare budgets and financial plans.

KNOWLEDGE is required to perform basic math, including calculations using fractions, percents, and/or ratios; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: to perform basic math plus algebra and geometry for practical applications; to read technical information, create and compose documents and participate in panel discussions; to solve practical problems and deal with a variety of concrete variables.

ABILITY is required to schedule a number of activities, meetings, and events; often gather, collate, and classify data; and consider a number of factors when using equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a significant diversity of individuals and groups; work with data of varied types and purposes; and utilize a variety of job-related equipment. In working with others, problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives, and problem-solving with equipment is significant. Specific abilities required to satisfactorily perform the functions of the job include: adhering to safety practices; being attentive to

details; implementing health and nutrition curriculum; meeting deadlines and schedules; and work under time constraints.

RESPONSIBILITY

Responsibilities include: working under limited supervision using standardized practices and methods; managing a department; and supervising the use of funds. Utilization of resources from other work units is often required to perform the job's functions. There is some opportunity to significantly impact the organization's services.

EDUCATION AND EXPERIENCE:

Bachelor's degree in business administration, public administration, transportation or related field. A combination of education, training, and/or experience that demonstrates equivalent knowledge and abilities may be considered in lieu of a bachelor's degree. One year of additional qualifying experience substitutes for each 24 semester/45 quarter units of education leading to one of the degrees.

Five years increasingly responsible transportation operations experience with at least three years at a supervisor or management level. School district or public sector experience is preferred.

WORKING ENVIRONMENT

The usual and customary methods of performing the job's functions require the following physical demands: occasional lifting, carrying, pushing, and/or pulling; some climbing and balancing; some stooping, kneeling, crouching, and/or crawling; and significant fine finger dexterity. Generally the job requires 70% sitting, 15% walking, and 15% standing. The job is performed under minimal temperature variations and some hazardous conditions.

EXPERIENCE

Job-related experience within the specialized field with increasing levels of responsibility is required.

EDUCATION

Bachelors degree in job-related area.

REQUIRED TESTING

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

CERTIFICATES

Valid California driver's license and evidence of insurability.

CONTINUING EDUCATION/TRAINING

None Specified.Participation in ongoing job-related training as assigned.

CLEARANCES

Criminal Justice Fingerprint/Background Clearance and Tuberculosis Clearance.California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; preemployment physical examination including tuberculosis (TB) and drug screen clearances.

FLSA STATUS

Exempt

SALARY RANGE

Management Range _4___

JOB SUMMARY

The Director of Transportation plans, organizes and directs transportation operations, programs and services. The incumbent ensures the Transportation department provides services that are within budget, meet the needs of the District, and comply with regulatory requirements.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

- Plan, organize, and direct the District's student transportation program (e.g., regular home-to-school, special education home-to-school, extracurricular).
- Direct the routing, scheduling and supervision of School Bus Drivers to ensure smooth operation of school bus routes for regular and special education.
- Conduct short and long-range planning activities, including cost analysis and recommendations for improving transportation services (e.g., schedules, routes, fleet replacement, staffing, emergency response plans, vehicle maintenance and replacement plans).
- Keep records of transportation program operations and costs in compliance with District policies and state regulations and submit reports as required.
- Prepare and oversee the Transportation Department budget, monitor fund balances, and ensure expenses are within budget and fiscal practices are followed.
- Supervise and evaluate the performance of assigned staff, interview and select employees, recommend disciplinary actions, and arrange for staff training as needed.
- Review incident reports, conduct accident investigations and take appropriate action.
- Oversee transportation maintenance activities, including the maintenance, repair, servicing and cleaning of school busses and other District-owned vehicles.
- Oversee staff training (e.g., safety, new bus driver training, requalifications, and routine inservices).
- Meets with administrators to plan scheduling, discuss policies and procedures, exchange information and resolve operational and logistics issues.
- Advise and make recommendations to District management staff on transportation-related matters; interpret transportation-related laws and policies for school personnel, parents, and others.
- Confer with school administrators, parents, insurance representatives, agencies, and citizens regarding major transportation-related concerns, and work toward consensus to resolve concerns.
- Ensure Transportation Department complies with applicable local, state, and federal regulations, and District policies.
- Participate in on-going departmental and District labor relations sessions.
- Research a variety of information to develop improved or new programs and services, ensure compliance with regulations, plan, take action or respond to requests for information.
- Collaborates with others (e.g., District personnel, community) to implement, maintain, or improve transportation services.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Transportation operations and management.
- State, federal, and local laws, regulations governing the transportation of students, operation of vehicles, and health and safety regulations.
- Principles and best practices in personnel management and training.
- Project management practices.
- Transportation records requirements.
- How to conduct accident and other transportation-related investigations.
- Methods, materials, tools, and equipment used in the maintenance and repair of a wide variety of fleet vehicles.
- School bus driver training and safety requirements.
- Budget preparation and control.
- Effective oral and written communication skills.
- Interpersonal skills using tact, patience, and courtesy.
- Negotiation and consensus-reaching skills.
- Operation of a computer and use of job-related software and other applications.

ABILITY TO:

- Plan and direct a full-service transportation department.
- Ensure Transportation Department operations and staff comply with state, federal, and local laws, regulations governing the transportation of students, operation of vehicles, and health and safety regulations.
- Plan, schedule, train, and supervise personnel to meet student transportation needs.
- Plan and manage projects.
- Accurately prepare and maintain required transportation records.
- Effectively conduct accident and other incident investigations and research.
- Oversee the maintenance and repair of a wide variety of fleet vehicles.
- Oversee school bus driver training and safety requirements.
- Develop and manage a comprehensive transportation budget.
- Communicate effectively in oral and written communications.
- Use tact, patience, and courtesy when communicating with others.
- Use effective negotiation and consensus-reaching skills when communicating with others.
- Use job-related software and other applications.

EDUCATION AND EXPERIENCE:

Bachelor's degree in business administration, public administration, transportation or related field. A combination of education, training, and/or experience that demonstrates equivalent knowledge and abilities may be considered in lieu of a bachelor's degree. One year of additional qualifying experience substitutes for each 24 semester/45 quarter units of education leading to one of the degrees.

Five years increasingly responsible transportation operations experience with at least three years at a supervisor or management level. School district or public sector experience is preferred.

REQUIRED TESTING

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

CERTIFICATES

Valid California driver's license.

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 Exempt

SALARY RANGE Management Range 4

SAN DIEGUITO UNION HIGH SCHOOL DISTRICT VACANCY REPORT 11/06/19

Classified Personnel

18 current/pending vacancies in 11 different job classifications

SITE	SLOT	JOB TITLE	Hrs/Wk	FTE	STATUS
SDA	AC622	School Plant Supervisor-HS		1.00	Selection interview November
DO	AA001	Accounting Assistant		1.00	Selection interview early December
SDA	AA026	Administrative Assistant IV		1.00	Selection interview early December
TECH	AM577	Information Technology Support Technician		1.00	Selection interview early December
TECH	AM576	Information Technology Support Technician		1.00	Selection interview early December
TRANS	AA498	School Bus Driver	20	0.50	Continuous recruitment
CCA	AD184	Custodian	40	1.00	Selection interview 11/08/2019
ос	AM625	Instructional Assistant Bilingual	18.75	0.47	Selection interview November
LCC	Al314	Instructional Assistant SpEd Severe	30	0.75	Selection interview November
TP	AJ157	Instructional Assistant SpEd Severe	30	0.75	Selection interview November
CV	AJ224	Instructional Assistant SpEd Non-Severe	30	0.75	Selection interview November
ос	AJ220	Instructional Assistant SpEd Non-Severe	30	0.75	Selection interview November
ATP	AI325	Instructional Assisant SpEd Severe	27.5	0.61	Selection interview November
ATP	AJ218	Instructional Assistant SpEd Severe	27.5	0.61	Selection interview November
FAC	AG338	Grounds Supervisor	40	1.00	Selection interview December
CV Café	AI916	Nutrition Services Assistant I	12.5	0.31	Selection interview 11/06/2019
DG Café	AJ075	Nutrition Services Assistant I	16.25	0.41	Selection interview 11/06/2019
DG Café	Al917	Nutrition Services Assistant I	12.5	0.31	Selection interview 11/06/2019

PERSONNEL LIST

CLASSIFIED PERSONNEL

Employment

- 1. <u>Classified Artist in Residence</u>, employment for the 2019-20 school year per attached supplement through 06/30/20.
- 2. <u>Classified A.V.I.D Tutors</u>, employment for the 2019-20 school year per attached supplement through 06/30/20.
- 3. <u>Classified Substitutes</u>, per attached supplement.
- 4. <u>Coaches</u>, employment for the 2019-20 school year per attached supplement through 06/30/20.
- 5. <u>Dewitt, Donovan</u>, Nutrition Services Assistant I, SR25, 28.12% FTE, Earl Warren Middle School, effective 09/16/19.
- 6. <u>Flower, Alan</u>, Instructional Assistant-SpEd (S), SR36, 75.00% FTE, Torrey Pines High School, effective 09/09/19.
- 7. <u>Hernandez, Selena</u>, Instructional Assistant-Bilingual, SR31, 46.87% FTE, Oak Crest Middle School, effective 09/11/19.
- 8. <u>Martinez, Marco</u>, Custodian, SR32, 100.00% FTE, San Dieguito High School Academy, effective 09/30/19.
- **9.** <u>Shaull, John</u>, Instructional Assistant-SpEd (NS), SR34, 48.75% FTE, Oak Crest Middle School, effective 09/09/19.
- **10.** <u>Uribe, Consuelo</u>, Nutrition Services Assistant I, SR25, 37.50% FTE, Oak Crest Middle School, effective 09/16/19.

Change in Assignment

- 1. <u>Pearson, Sheilah</u>, from Instructional Assistant-SpEd (NS), SR34, 48.75% FTE, Diegueno Middle School to Instructional Assistant-SpEd (BI), SR36, 75.00% FTE, Pacific Trails Middle School, effective 09/24/19.
- <u>Ma, Kam</u>, from Nutrition Services Assistant I, SR25, 43.75% FTE, Torrey Pines High School to Nutrition Services Assistant I, SR25, 48.75% FTE, Torrey Pines High School, effective 09/24/19.

Resignation

- 1. <u>Graciano, Sheila</u>, Senior Buyer, SR44, 100.00% FTE, District Office-Purchasing Department, resignation for the purpose of retirement, effective 12/30/19.
- 2. <u>Librado Jr., Andres</u>, School Plant Supervisor-High School, SR41, 100.00% FTE, Canyon Crest Academy, effective 09/17/19.
- **3.** <u>Ryan-Sonnich, Leah</u>, Administrative Assistant IV, SR44, 100.00% FTE, San Dieguito High School Academy, resignation for the purpose of retirement, effective 12/26/19.

sj 10/10/19 classbdagenda

Classified Personnel Supplement, October 10, 2019

Artist In Residence

CCA - Certificated Artist in Residence

Bloodgood, Cynthia, Conservatory, effective 09/17/2019

CVMS- Classified Artist in Residence

Covell, Tiffany, Music Coach, effective 09/24/2019 Jones, Josh, Music Coach, effective 09/24/2019 Rockwell, Karen, Music Coach, effective 09/24/2019 Smith, Kiersten, Music Coach, effective 09/24/2019 Weed, Mark, Music Coach, effective 09/24/2019

DMS- Classified Artist in Residence

Janelli, Michele, Music Coach, effective 09/17/2019 Ebner, Steve, Music Coach, effective 09/17/2019

OCMS- Classified Artist in Residence

Ebner, Steve, Music Coach, effective 09/17/2019 Janelli, Michelle, Music Coach, effective 09/17/2019

SDA Classified Artist in Residence

Ebner, Steven, Music Coach, effective 09/17/2019 Janelli, Michele, Music Coach, effective 09/17/2019 Miller, Scott, Music Coach, effective 09/17/2019 Freiman, Alina, Music Coach, effective 09/17/2019 Trumbore, Rachel, Music Coach, effective 09/17/2019

TPHS- Classified Artist in Residence

Kwak, Jisoo "Jenny", Dance Coach, effective 09/17/2019

AVID TUTOR

Cortez, Andrea, LCCHS, effective 09/24/2019 Steel, Riley, OCMS, effective 09/24/2019 Michael, Jamila, SDA, effective 09/19/2019 Villa, Vanessa, LCCHS, effective 09/19/2019 Castillejos, Belen, LCCHS, effective 09/19/2019 Rivera, Mason, CCA, effective 09/17/2019 Tlatempa, Rosa, LCCHS and DMS, effective 09/18/2019

Classified Substitutes

Donigan, Naoko, Clerical, effective 09/17/2019 Gonzales, Christian, Custodian, effective 09/17/2019 Hoekstra, Susan, Clerical, effective 09/17/2019 Kirkpatrick, Kathleen, Clerical, effective 09/17/19 Mathur, Kiran, Clerical, effective 09/17/2019 Satterburg, Randy, Clerical and Instructional Aid, effective 09/17/2019 Turner, Erin, Clerical, effective 09/17/2019 Steigerwald, Jill, Clerical, effective 09/17/2019 Stepanian, Laura, Clerical, effective 09/17/2019 Walke, Susan, Clerical, effective 09/17/2019 Wiltemore, Lisa, Clerical, effective 09/17/2019

<u>Coaches</u>

CCA-Walk-on

Djippov, Preslav, Girls Water Polo Varsity, Winter Season, effective 09/17/2019