

## HEAD ACCOUNTANT

### DEFINITION

Directs and is responsible for complex accounting and related activities such as reporting of fiscal data related to legislation, budgets, and financial forecasting, carried out by a large staff of professional, technical, and clerical employees in a specialized section of the Accounting and Disbursements Division.

### TYPICAL DUTIES

- Plans and directs the activities of a large group of professional, technical, and clerical employees engaged in a specialized part of the accounting, and financial reporting systems, paying, disbursing, and controlling functions of the Accounting and Disbursements Division.
- Analyzes and reviews various complex and interrelated components of the District's financial reporting system to develop and recommend improvements and to increase the accuracy and efficiency of projections regarding the District's total financial status (income and expenditure projections and cost allocation to programs).
- Directs and participates in the development or revision of procedures in order to meet requirements of law, to provide requested services to management and employees, to improve efficiency in activities, and to coordinate activities with those of other sections, branches and divisions.
- Consults with and advises District administrators on systems and procedures, services provided, and requirements of laws and rules.
- Consults with and obtains information and advice from administrative and legal personnel and from representatives of other governmental agencies.
- Reviews major accounting, payroll, and statistical reports; procedural instructions; financial systems reports of special studies and investigations; and makes decisions or recommendations.
- Represents the section or branch on committees studying possible changes in organization, procedures, or regulations affecting inter-section activities.
- Acts as liaison between the District and other educational agencies to obtain clarification of procedures and guidelines and makes determination regarding the preparation of reports to federal, State, and county offices.
- Directs, approves, or recommends the establishment of controls to ensure accuracy of financial records and statements and source documents.
- Advises subordinates and others on difficult problems of procedures and accounting classifications, and on legal requirements and restrictions.
- Prepares or supervises the preparation of Board reports, reviews Board Reports and other documents for pertinent information, and follows up to ensure that necessary actions are taken.
- May prepare state required financial reports on a variety of programs, including reimbursements claims for certain State and federal programs.
- May answer questions and complaints from vendors, contractors, and others about the payment of no salary obligations or requests for information and documents from contract auditors.
- May act for a Director of Accounting or an Accounting Manager during absence or as assigned.
- Performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Head Accountant is the administrative head of a specialized section engaged in accounting and related activities such as reporting fiscal data directly related to legislation, budget, cost, and financial forecasting. The class is characterized by administrative responsibility for planning, scheduling, and coordinating day-to-day activities of a large number of professional, technical, and clerical employees.

An Accounting Manager plans and directs the maintenance of central accounting records and controls within 2 or more specialized sections for all District financial transactions through multiple Head Accountants.

A Principal Accountant performs a combination of professional accounting and administrative duties as an assistant to the head of a major section or as the responsible supervisor of a section with less technical accounting functions.

## SUPERVISION

General direction is received from the Director of Accounting or the Accounting Manager. General direction is exercised over supervisory accounting personnel and lower-level employees in professional, technical, and clerical classes.

## CLASS QUALIFICATIONS

### Knowledge of:

- Governmental tax and school accounting theory and practice
- Provisions of the Education Code and city, county, State, and federal laws, rules, and regulations affecting public-school accounting and financial activities
- Fiscal management and statistical reporting techniques
- Principles of work organization and simplification
- Structure of the District's accounting and budgeting systems
- Basic capabilities of computers and accounting and budgeting software systems
- Principles of supervision
- District personnel, payroll, budget, and accounting systems
- Principles and practices of budget preparation and control, cost accounting, and fiscal management, particularly as they relate to a large school district

### Ability to:

- Plan, direct, and review a variety of accounting and related activities and meet deadlines
- Analyze financial activities of a large organization
- Manage complex projects that span across multiple functional areas
- Analyze and interpret accounting and statistical data
- Analyze budgetary and cost reports
- Analyze and interpret legislation affecting District finances
- Express difficult concepts orally and in writing
- Work effectively with departments and individuals
- Direct, conduct, and participate in orientation and training of professional and clerical employees
- Prepare clear, concise reports and recommendations
- Plan, supervise, and conduct training of employees
- Make effective oral presentations

## ENTRANCE QUALIFICATIONS

### Education:

Graduation from a recognized college or university with a bachelor's degree in accounting, business administration, auditing, finance, or a related field, including or supplemented by the completion of courses that provide at least 20 semester units or equivalent quarter units in accounting. A bachelor's degree in accounting is highly preferable.

### Experience:

Four years of professional-level experience in accounting, field-auditing, or analysis of financial systems and forecasting; this experience must include two years of supervision of professional accounting personnel. Two years of governmental accounting or governmental field-auditing experience preferred.

### Special:

Certification as a Certified Public Accountant (CPA) is preferable

## SPECIAL NOTES

1. Management class, exempt from bargaining units.
2. An employee in this class may be subject to the reporting requirements of the District's Conflict of Interest Code.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.

Revised  
09-16-2021  
SD