

COORDINATING FINANCIAL MANAGER

DEFINITION

Trains and advises personnel engaged in student body financial activities in District schools and reviews related reports and operations in order to ensure compliance with legal, policy, cash controls, and procedural requirements governing such financial activities.

TYPICAL DUTIES

Provides on-the-job training and conducts training sessions in student body financial operations for personnel managing student body financial activities.

Confers with and advises administrators, principals, school-assigned personnel, and parent-teacher groups, and serves on committees considering such student body financial matters as applicable laws and policies, accounting and purchasing procedures, fund-raising activities, inventory practices, student store operations, and specific financial problems.

Reviews student body financial statements, identifies errors and financial problems, and assists school personnel in resolving such matters.

Performs compliance reviews of student body financial activities and cash controls.

Follows up auditors' reports concerning student body finances to ensure conformance to laws, policies, and established practices and to assist in establishing procedures for correcting deficiencies.

Verifies submission of financial reports to the Student Body Finance Section and other offices of the Board of Education.

Compiles statistical reports reflecting student body financial operations.

May substitute for financial managers during absences.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Coordinating Financial Manager exercises technical supervision over student body financial activities.

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.

A Fiscal Services Manager supervises and participates in budget preparation and modification, expenditure analysis, and budget adjustment for schools, administrative regions, programs, large branches, divisions, local districts, or the District.

A Senior Financial Manager is responsible for the financial functions of a student body finance office in a senior high school where work difficulty is increased by greater responsibility for the athletic, recreational, and social activities and by more elaborate graduation activities than take place in a middle school.

SUPERVISION

General supervision is received from the Director of Accounting or Head Accountant. Technical supervision is exercised over the work of Financial Managers, Senior Financial Managers, Occupational Center Financial Managers, School Accounting Clerks, School Administrative Assistants at elementary schools, and the work of other personnel in schools and occupational and skills centers with respect to student body financial activities. Immediate supervision may be exercised over student employees and adult student body employees when substituting for financial managers.

CLASS QUALIFICATIONS

Knowledge of:

- Accounting and auditing methods
- Purchasing and merchandising techniques
- Budgeting procedures
- Federal and State sales and employment tax regulations
- Basic principles of office computer operation
- Education Code provisions and District policies governing student body financial activities and cash controls

Ability to:

- Train and exercise general and technical supervision over personnel engaged in student body financial activities
- Train personnel in the operation of the student body accounting system
- Compile and analyze accounting data
- Supervise and coordinate the work of students and paid adult student body employees
- Work effectively with school personnel, other District personnel, parents, students, and vendors

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university with a bachelor's degree, including or supplemented by the successful completion of 15 semester units or the equivalent number of quarter units in college-level accounting. Additional qualifying experience may be substituted for up to two years of the required education on a year-for-year basis, provided that the requirement of 15 semester units or the equivalent quarter units in college-level accounting is met.

Experience:

Three years as a Financial Manager, Senior Financial Manager, or Occupational Center Financial Manager or equivalent combination thereof.

Special:

A valid driver's license to legally operate a motor vehicle in the State of California and the use of a motor vehicle, or the ability to utilize an alternative method of transportation.

SPECIAL NOTE

1. An employee in this class may be subject to the reporting requirements of the District's Conflict of Interest Code.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of the position at any time.

Revised
11-25-13
JPK²

Updated
04-09-25
Transportation
Language Only