

**SAN DIEGO UNIFIED SCHOOL DISTRICT**

**POSITION DESCRIPTION**

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| <b>TITLE:</b>      | Associate Legislative Financial Accountant | <b>REPORTS TO:</b>     | Director, Resource Development |
| <b>DEPARTMENT:</b> | Financial Operations                       | <b>CLASSIFICATION:</b> | Classified                     |
| <b>FLSA:</b>       | Exempt                                     | <b>SALARY GRADE:</b>   | 050<br>OTBS                    |
| <b>ISSUED:</b>     | August 8, 2006                             |                        |                                |

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**BASIC FUNCTION:**

Participate in review and analysis of legislation for school related state mandated programs, and prepares claims for reimbursement of district incurred costs for state mandated programs within an assigned area(s).

**REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)**

**E = Essential Functions**

Assist in conducting financial studies and evaluations of existing and proposed legislation related to mandated costs incurred from enactment of new state laws and modifications to existing mandates. **E**

Research complex questions and provide related information to Legislative Financial Accountant, Office of Resource Development Director, and/or district staff. **E**

Develop and write the financial position of the school district on effects to district income and of effects to other school districts. **E**

Participate in the preparation of mandated cost test claims and prepares continuing claims, and incorrect reduction claims. **E**

Research and document current district procedures related to mandated cost claims and recommends changes as necessary. **E**

Conduct audits to insure expenditures comply with reimbursement claim requirements. **E**

Identify and resolve discrepancies; maintain claim files and statistical records. **E**

Prepare and submit financial reports, schedules, and fact sheets as required. **E**

Prepare revenue estimates of mandated costs and analyses of district revenue receipts. **E**

Prepare summaries of mandated cost reimbursements. **E**

Attend meetings, act as liaison with auditors from the State Controller's office, and respond to audit requests. **E**

Perform related duties as assigned.

**MINIMUM QUALIFICATIONS:**

**EDUCATION AND EXPERIENCE:**

Any combination of training, experience, and/or education equivalent to graduation from a recognized four year college or university with a major in finance, accounting, business or public administration, political science, or other directly related field and 2 years of recent related budgetary or accounting experience of acceptable level & quality.

**LICENSES AND OTHER REQUIREMENTS:**

Possession of a valid California driver's license and availability of private transportation (mileage expense allowance provided).

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

The state legislative process.

Use of legal reference materials.

Applicable laws, codes, regulations, policies, and procedures.

Principles and procedures of accounting systems.

Computer software applications used in financial accounting including Excel, Word and Access.

Technical aspects of field of specialty.

Computer models used in accounting.

Oral and written communication skills.

**ABILITY TO:**

Learn complex legislative analysis and legislative mandate procedures.

Maintain current knowledge of applicable District policies and procedures and applicable provisions of federal and state laws, rules and regulations, and court procedures.

Prepare complex financial reports and other statistical documents.

Perform statistical analysis and audits.

Perceive organizational implications of conclusions and exercise sound judgment in preparing justification and making recommendations.

Operate standard office equipment including microcomputers and related software applications.

Communicate effectively orally and in writing.

Establish and maintain effective working relationships with all levels of district staff, other organizations and public agencies.

Plan and organize work.

Meet schedules and time lines.

Maintain records.

Read, interpret, apply, and explain rules, regulations, policies, and procedures.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Office setting and driving to perform work.

**PHYSICAL REQUIREMENTS:**

Hearing and speaking to exchange information; seeing to perform assigned duties; sitting for extended periods of time; dexterity of hands and fingers to operate equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

**DISTINGUISHING CHARACTERISTICS:**

Assignments include continuous mandated cost accountancy study and control within a division and range in difficulty from moderate to complex. This class is expected to research and identify legislation and legislative issues as it impacts the District, make recommendations, and file claims to maximize reimbursements. It is distinguished from the next higher class of Legislative Financial Accountant in that the latter independently performs major financial accounting and administrative studies which may cross division lines and provides technical assistance to lower level staff in divisions and departments.

Note: An incumbent in the job class of Associate Legislative Financial Accountant may be promoted to the next higher job class of Legislative Financial Accountant upon certification by the department head and approval by the division head that the incumbent meets the minimum qualifications listed on the current class description of the higher job class and is regularly performing a majority of the higher level duties.

Job Code 6840

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