

LA MESA-SPRING VALLEY SCHOOLS

CLASS TITLE: EXECUTIVE ASSISTANT I, BUSINESS SERVICES

BASIC FUNCTION:

The job of Executive Assistant I, Business Services, is done for the purpose/s of providing a wide variety of complex and confidential administrative support; and communicating information on behalf of and acting as a liaison for the Assistant Superintendent, Business Services, with school district staff, other school districts, auditors, attorneys, insurance companies, public agencies, parents and other stakeholders.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Assists in planning, organizing, and developing programs related to budgeting, finance, risk-management, and other business services to ensure compliance with district, State and/or Federal requirements and meeting the educational objectives of the district.

Attends meetings relating to Business Services to provide information, record official minutes, coordinate distribution of materials and support the needs of the attendees.

Audits a variety of programs and processes as assigned for the purpose of ensuring compliance with established policies, procedures, and/or education codes.

Communicates with various district personnel, school sites, departments, students, outside agencies, and the general public to exchange information, coordinate activities and resolve issues or concerns related to Business Services; responds to a wide variety of inquiries and questions from internal and external parties, and provides Business Services-related information accordingly.

Compiles data from a wide variety of sources (e.g., agenda items, payroll, budget, etc.) for the purpose of complying with financial, legal, and/or administrative requirements.

Composes complex business documents for the purpose of communicating information to school and district personnel, the public, etc.

Coordinates a wide variety of Business Services projects, functions and/or program components to assist with activities and/or deliver services in a timely fashion.

Develop, prepare, and revise governing board agenda items for the Assistant Superintendent, Business Services and Business Services directors.

Evaluates situations (e.g., involving staff, students, parents, the public, etc.) for the purpose of taking appropriate action and/or directing to appropriate personnel for resolution.

Maintains confidential files and manual/electronic documents including property value and claim status databases, to provide up-to-date information and/or historical reference in accordance with established administrative guidelines and legal requirements, ensures accuracy of materials and complies with all Federal/State/district regulations.

Manages a wide variety of processes on behalf of the Assistant Superintendent, Business Services, to achieve goals and meet target dates in compliance with established guidelines and regulatory requirements.

Oversees the work activities within the office to organize assignments, monitor progress, and ensure completion within established guidelines.

Prepares, revises and/or composes a wide variety of Business Services related and other reports, documents, forms, procedures, meeting minutes, bulletins, manuals and correspondence of a confidential and non-confidential nature to document activities including the annual comprehensive insurance survey, provide written reference, convey information, and/or create documentation in conformance with established guidelines.

Processes a wide variety of Business Services documents and materials to disseminate information in compliance with program, district, State and/or Federal requirements.

Procures supplies and materials for the purpose of maintaining availability of required items.

Reports property damage and repair or replacement costs of stolen/damaged items to law enforcement agencies and County Risk Management; completes property damage claim forms and submits property damage claims to County Risk Management; follows up with deputy probation officers and/or other law enforcement agencies regarding crime and victim reports.

Represents the Assistant Superintendent, Business Services, in their absence to convey and/or gather information required for their functions.

Researches a variety of topics including but not limited to budgeting, finance, and risk-management to provide information and/or recommendations that address a variety of administrative or legal requirements.

Responds to a wide variety of inquiries from internal and external parties to provide information, resolve issues, facilitate communication among parties and/or provide direction.

Reviews incoming claims for accuracy, irregularities, and completeness; ensures proper and efficient handling of claim documents; gathers data relating to claims from internal or external resources; and forwards documents to legal and risk management agencies and/or processes in-house claims.

Schedules a wide variety of activities to make necessary arrangements for the Assistant Superintendent, Business Services and other assigned administrative personnel.

Supports assigned administrative personnel to provide assistance with their administrative functions.

OTHER DUTIES:

Attends and participates in meetings, in-service trainings, workshops and conferences.

Performs other duties as assigned for the purpose of ensuring the efficient and effective functioning of the district's operations.

Presents information on administrative procedures for the purpose of orienting new personnel and/or disseminating information to existing personnel.

KNOWLEDGE AND ABILITIES:**KNOWLEDGE OF:**

Applicable laws, codes, regulations, policies and procedures.
Basic public relations techniques.
Budgeting practices regarding monitoring and control.
Business letter and report writing, editing and proofreading.
Correct English usage, grammar, spelling, punctuation and vocabulary.
Functions and secretarial operations of an administrative office.
General knowledge of risk management principles.
Insurance policies and procedures.
Interpersonal skills using tact, patience and courtesy.
Methods of collecting and organizing data and information.
Modern office practices, procedures and equipment.
Operation of a computer and assigned software.
Oral and written communication skills.
Organizational operations, policies and objectives.
Principles, operations and techniques of claims administration.
Record-keeping techniques.

ABILITY TO:

Analyze situations accurately and adopt an effective course of action.
Assure efficient and timely completion of office and program projects and activities.
Communicate effectively both orally and in writing and make oral presentations.
Compile and prepare comprehensive reports concerning a broad spectrum of subject matter.
Compose effective correspondence independently.
Establish and maintain cooperative and effective working relationships with others.
Exercise independent judgement.
Identify, investigate and resolve financial errors and discrepancies.
Initiate queries, develop spreadsheets, and generate a variety of computerized lists and reports.
Interpret, apply and explain complex laws, codes, rules, regulations, policies and procedures.
Maintain a variety of complex and confidential files and records.
Meet schedules and timelines.
Operate a variety of office equipment including a computer and assigned software.
Organize complex material and summarize discussions and actions taken in report form.
Perform highly responsible and confidential secretarial and administrative assistant duties to relieve the Assistant Superintendent of administrative details.

Plan and organize work.
Plan, coordinate and organize office activities and flow of communications and information for the assigned administrator.
Prioritize and schedule work.
Remain current on laws relating to insurance.
Review, process, evaluate, and verify a variety of financial information.
Take and transcribe dictation at an acceptable rate of speed.
Type or input data at an acceptable rate of speed.
Understand and follow oral and written instructions.
Understand and resolve issues, complaints or problems.
Utilize a variety of accounting and fiscal reporting systems.
Work confidentially with discretion.
Work independently with little direction.

EDUCATION AND EXPERIENCE:

High school diploma or equivalent; and five years of increasingly responsible administrative experience within a specialized field is required. Previous experience in school district administrative work in the business office and/or previous experience with insurance claims is preferred.

LICENSES AND OTHER REQUIREMENTS:

Successful passage of the district's job-related examination.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.
Constant interruptions.

PHYSICAL DEMANDS:

Hearing and speaking to exchange information in person or on the telephone.
Dexterity of hands and fingers to operate a computer keyboard.
Seeing to read a variety of materials.
Sitting or standing for extended periods of time.
Bending the waist, kneeling or crouching to file materials.
Reaching overhead, above the shoulders and horizontally to retrieve materials.
Lifting and carrying light objects.

FLSA Status

Non Exempt

Approval Date

11/19/15, (previous Admin. Asst.) 9/28/17, 3/15/22