

## North Monterey County Unified School District

### POSITION DESCRIPTION

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Position Title:	<b>Executive Assistant (Confidential) – Business Services</b>
Salary:	Classified Confidential – Grade II
Calendar:	12 Month
Reports to:	Assistant Superintendent-Business Services

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#### **SUMMARY:**

Under general direction of the Assistant Superintendent – Business Services, the Executive Assistant plans, organizes and performs a wide variety of responsible, complex, and confidential secretarial and administrative support functions specific to Business Services. This position requires a high level of organizational/secretarial skills as well as an in-depth knowledge of business department policies, procedures and requirements. Provides assistance to the Assistant Superintendent - Business Services in fulfilling the responsibilities of the position and in support of the Business Department operations. Performs other duties directly related to this job description.

*The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed, as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.*

#### **DUTIES AND RESPONSIBILITIES**

The following is a list of duties that are representative of the position and include, but are not limited to:

##### **Essential Duties:**

- Manages phone system "roll-over" voicemail messages for the District Office.
- Collects developer fees and maintains related records.
- Maintains business office supplies and order forms for the district as needed.
- Receipts all payments to district, and organizes and distributes Payroll and Accounts Payable checks.
- Updates Business and Facility Department websites as necessary.
- Assists Accounts Payable and Payroll with filing as needed.
- Routes and prioritizes correspondence warranting attention of the Assistant Superintendent of Business Services.
- Maintains all District contracts.
- Assists in compiling and preparing Board Agenda items; maintains business governance calendar.
- Assists other business services staff as directed.
- Coordinates all mandated costs visits, claims, and acts as liaison between the District and provider.
- Responsible for receiving, coordinating, processing and documenting all Property & Liability Claims/Reports and Analysis, including working with sites in obtaining incident reports, conducting interviews and/or scheduling appointments with

investigators; providing Tort Claim Forms and reviewing the process with claimants; and coordinating with third party insurance entities; working with assigned claim agents to get needed sheriff reports, photos, other supporting documentation; working with outside insurance companies and process rejections of claims, developing board annotations.

- Performs coordination duties as they related to the business aspect of workers compensation and all P&L insurance claims between the District and provider; completes insurance annual reports such as, but not limited to, final payroll information for workers compensation or annual Property Questionnaires. Ensures the prompt delivery to sites of student insurance information on an annual basis
- Update Certificates of Insurance for the District and process requests from staff for proof of insurance for vendors, grants, etc.
- Responsible for miscellaneous business department reporting, including but not limited to: J- 90 Salary Placement reporting, miscellaneous grants, generation of business department purchase orders, etc.
- Performs miscellaneous financial analysis as required
- Conducts various research projects as directed by the Assistant Superintendent of Business Service.
- Supports with training clerical staff as needed
- Participates in cross training in order to provide back up for other Executive Assistants (Confidential) and other business office staff members.
- Assists the Assistant Superintendent in formulating the District's positions on financial and other issues in collective bargaining with certificated and classified unions.
- Sorts and delivers incoming mail and delivers daily outgoing mail to the Post Office on a rotating basis.
- Maintains the Assistant Superintendent of Business Services appointment calendar.
- Make necessary arrangements for meetings, workshops, etc. conducted or attended by Assistant Superintendent of Business Service.
- Prepares a wide variety of manual and electronic materials (e.g. agendas, reports, memos, letters, and minutes) for the purpose of documenting activities, providing written reference and/or conveying information.
- Maintains a wide variety of manual and electronic files, records and other materials for the purpose of providing up—to-date reference and audit trail for compliance.
- Communicate at a high level of competency in the English language, both orally and in writing, including composing and maintaining correspondence, responses, and memoranda. Create letters, reports and forms as assigned by the Assistant Superintendent of Business Service.
- Attends and participates in relevant meetings, workshops, and seminars.
- Maintains files, confidential and otherwise.
- Prepares reports, bulletins, minutes, memoranda, correspondence, agendas, notification, recordings, and mailings.
- Work with departments to respond to Public Records Requests in a legal and timely fashion; maintains request logs.
- Maintains and prepares district handbooks as necessary, including budget related booklets.

- Provides support in preparation and distribution of financial information, such as budgets and financial statements.
- Provides back up support to the Administrative Assistant to the Superintendent for Board of Trustee meetings, and other District meetings, which require public minutes/recordkeeping.
- Researches Education Code as required.
- Use judgment and analytical skills to best protect the District from liability
- Perform other related duties as performed.

### **KNOWLEDGE, SKILLS AND ABILITIES REQUIRED**

- Perform all duties with a minimum of supervision; must be able to work with frequent interruptions, in person and by telephone
- Must be flexible and able to change projects or priorities on a frequent basis
- Ability to see and read, with or without vision aids; ability to hear and understand speech at normal levels; ability to communicate so others will clearly understand normal conversation. Ability to understand and follow oral and written instructions.
- Ability to perform a variety of moderately difficult to complex secretarial and administrative support involving use of independent judgment and requiring accuracy and speed.
- Skill in managing multiple priorities in a fast-paced environment; excellent organizational abilities.
- Ability to operate a variety of office machines and equipment including copier, , calculator, computer, and printer as required.
- Intermediate to advanced knowledge of computer applications (word processing, spreadsheets, databases, email, calendaring, financial software).
- Ability to perform basic to complex mathematical calculations.
- Knowledge of general policies, procedures, and organization of a school district and its systems.
- Ability to proactively maintain cooperative working relationships at all levels.
- Ability to meet the public courteously and tactfully in situations that require diplomacy, friendliness, and firmness.
- Ability to maintain strict confidentiality.
- Ability to input on a computer keyboard at a high rate of speed.

### **WORKING CONDITIONS**

Dexterity of hands and fingers to operate standard office equipment, including a computer system to type letters, reports and other materials; bending, reaching to maintain files; hearing to answer telephone; speaking to exchange information, and sitting and operating a keyboard to enter data into a computer system for extended periods of time.

Physical demands include lifting up to 20 pounds at waist height, sitting, standing, and walking for extended periods, bending at the waist, pushing, pulling, stooping, kneeling, twisting, turning, reaching, stretching, handling, grasping.

Physical, mental, and emotional stamina to perform the duties and responsibilities of the position, with the expectation of a moderate to high stress level.  
Mental acuity to collect and interpret data, evaluate, reason, define problems, establish facts, draw valid conclusions, make valid judgments and decisions.

Environmental Conditions:

Indoor office environment, school setting, temperature - normal climate.

**QUALIFICATIONS**

- Education equivalent to the completion of the twelfth grade to assure the ability to read and write English and perform mathematical calculations at the level required for successful job performance.
- Advanced training or education in fiscal operations.
- A total of five years clerical and public relations/customer service experience.
- At least two years of experience in a school setting.
- ***Bilingual English/Spanish highly desirable.***
- Dexterity and physical condition to maintain a rigorous work schedule and meet standards of physical and mental health.
- To perform this job successfully, an individual must be able to perform each principle duty satisfactorily.
- Reasonable accommodation may be made to enable individuals with disabilities to perform the principal functions of the position.

Certificates/Licenses:

Possession of a valid California driver's license.

***The information contained in this job description is for compliance with the Americans with Disabilities Act (A.D.A.) and is not an exhaustive list of the duties performed. Individuals holding this position may perform additional duties and additional duties may be assigned.***

Board Approved: November 21, 2019