

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Regular Meeting

3:30 P.M., February 11, 2020
710 Encinitas Boulevard, Encinitas, CA 92024
District Office Board Room 101

PUBLIC COMMENTS

If you wish to speak regarding an item on the agenda, please complete a "Request to Address the Personnel Commission" slip located at the sign-in table and present it to Personnel Commission staff prior to the start of the meeting. When the Personnel Commission Chair invites you to speak, please state your name, address, and the name of your organization before making your presentation. In the interest of time and order, presentations from the public should be focused and on topic. The Commission Chair will curtail public comments that become repetitive, unfocused or off topic.

Persons wishing to address the Personnel Commission on any Commission-related issue not elsewhere on the agenda are invited to do so when the Commission calls for "Public Comments" under that item of the agenda. Please follow the same directions (above) for speaking to agenda items.

Complaints or charges against an employee are not permitted in an open meeting of the Personnel Commission. Instead, such matters should be provided in writing to the Commission through the Classified Personnel Office.

AGENDA POSTING REQUIREMENTS

In accordance with the Brown Act and Personnel Commission Rules, agenda for Regular Personnel Commission Meetings will be posted at least 72 hours prior to the meeting. Agendas for Special Meetings will be posted at least 24 hours prior to the meeting.

PUBLIC INSPECTION OF DOCUMENTS

A copy of this agenda with all the supporting documents is available for review in the Classified Personnel Office between 8:00 AM and 4:30 PM, and is available on the district website, www.sduhsd.net. In addition, a copy of the Personnel Commission Rules and Regulations may also be found on the district website.

CELL PHONES/ELECTRONIC DEVICES

As a courtesy to all attendees, please silence all electronic devices to silent mode and engage in conversations outside the meeting room.

REQUESTS FOR DISABILITY-RELATED MODIFICATIONS OR ACCOMODATIONS

In compliance with the Americans with Disabilities Act, if you need special assistance, disability-related modifications, or accommodations including auxiliary aids or services, in order to participate in the public meetings of the Personnel Commission, please contact the Classified Personnel Office at (760) 753-6491 x5543. Notification 72 hours prior to the meeting will enable staff to make reasonable arrangements to ensure accommodation and accessibility to this meeting. Upon request, the Commission shall also make available this agenda and all other public records associated with the meeting in appropriate alternative formats for the persons with a disability.

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Regular Meeting Agenda

3:30 P.M., February 11, 2020

710 Encinitas Blvd., Encinitas CA 92024

San Dieguito Union High School District Office – Large Board Room

REGULAR MEETING/OPEN SESSION

1. Call to Order Commission Chair
2. Pledge of Allegiance
3. Approval of the Agenda for the February 11, 2020, Personnel Commission Regular Meeting.
Motion by _____, second by _____, to approve the agenda for the February 11, 2020 Personnel Commission Regular Meeting.
4. Approval of the Minutes for the January 14, 2020 Personnel Commission Regular Meeting.
Motion by _____, second by _____, to approve the minutes for the January 14, 2020 Personnel Commission Regular Meeting.

ACTION ITEMS (See Supplements)

5. ELIGIBILITY LISTS TO BE ESTABLISHED
 - A. Motion by _____, second by _____, to establish an Eligibility List for Custodian, SR 32, Open/Promotional-Dual Certification, six months eligibility.
 - B. Motion by _____, second by _____, to establish an Eligibility List for Custodian-Floater, SR 33, Open/Promotional-Dual Certification, six months eligibility.
 - C. Motion by _____, second by _____, to establish an Eligibility List for Administrative Assistant II, SR 40, Open/Promotional-Dual Certification, six months eligibility.
6. ELIGIBILITY LISTS TO BE APPROVED
 - A. Motion by _____, second by _____, to approve a Continuous Filing Eligibility List for Nutrition Services Assistant I, SR 25, Open/Promotional-Dual Certification, update effective as of 1/16/20.
 - B. Motion by _____, second by _____, to approve a Continuous Filing Eligibility List for Instructional Assistant SpEd Non-Severe, SR 34, Open/Promotional-Dual Certification, update effective as of 1/27/20.
 - C. Motion by _____, second by _____, to approve an Eligibility List for Secretary, SR 36, Open/Promotional-Dual Certification, eligibility effective from 1/27/20.
 - D. Motion by _____, second by _____, to approve an Eligibility List for Director of Transportation, Management Salary, Group 5, Range 4, Open/Promotional-Dual Certification, eligibility from 1/29/2020.
 - E. Motion by _____, second by _____, to approve a Continuous Filing Eligibility List for School Bus Driver, SR 38, Open/Promotional-Dual Certification, update effective as of 1/30/2020.

DISCUSSION/INFORMATION ITEMS (See Supplements)

7. CLASSIFICATION REVIEWS

Merging of classifications within the Finance Department

- A. Motion by _____, second by _____, to establish a new classification of Accountant as presented.
- B. Motion by _____, second by _____, to recommend to the SDUHSD Board of Education allocating the classification of Accountant to Range 52 of the Classified Employees Salary Schedule.
- C. Motion by _____, second by _____, to abolish the classifications of Accounting Specialist and Budget Analyst.
- D. Motion by _____, second by _____, to reclassify incumbents in the Accounting Specialist and Budget Analyst classifications to the classification of Accountant.

8. STAFF COMMENTS ON PERSONNEL ACTIVITIES

- A. Vacancy Report
- B. Personnel List Report
- C. Other

9. CORRESPONDENCE

10. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised during public comments except to 1) acknowledge receipt of the information, 2) refer to staff for further study, or 3) refer the matter to the next agenda.

- A. California School Employees Association
- B. San Dieguito Union High School District
- C. Public

11. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, March 10, 2020, at 3:30 P.M. in the San Dieguito UHSD Board Room, 710 Encinitas Blvd., Encinitas, CA 92024.

12. ADJOURNMENT

**San Dieguito Union High School District
PERSONNEL COMMISSION**

Regular Meeting Minutes

3:30 PM, January 14, 2020

710 Encinitas Blvd., Encinitas, CA 92024

San Dieguito Union High School District Office - Board Room

REGULAR MEETING/OPEN SESSION

1. CALL TO ORDER

The meeting was called to order at 3:30 p.m. by JUSTIN CUNNINGHAM

2. PLEDGE OF ALLEGIANCE

Commissioner Cunningham led the pledge of allegiance.

Members in Attendance

Jeff Charles

Justin Cunningham

Staff in Attendance

Susan Dixon, Director

Kathy Potter, Human Resources Technician

Guests

Carmen Blum

April Llamas

3. APPROVAL OF THE AGENDA FOR THE JANUARY 14, 2020, PERSONNEL COMMISSION REGULAR MEETING.

It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve the agenda for the January 14, 2020, Personnel Commission Regular Meeting.

Passed

4. APPROVAL OF THE MINUTES FOR THE DECEMBER 10, 2019, PERSONNEL COMMISSION REGULAR MEETING.

It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve the minutes for the December 10, 2019, Personnel Commission Regular Meeting.

Passed

ACTION ITEMS

5. ELIGIBILITY LISTS TO BE ESTABLISHED

A. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for Secretary, SR 36, Open/Promotional-Dual Certification, six months eligibility.

B. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to establish an Eligibility List for Director of Transportation, Management Salary, Group 5, Range 4, Open/Promotional-Dual Certification, six months eligibility.

C. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM to establish an Eligibility List for Communications Coordinator, Management Salary, Group 5, Range 11, Open/Promotional-Dual Certification, six months eligibility.

- D. Motion by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM to establish an Eligibility List for Locksmith, SR47, Open/Promotional-Dual Certification, six months eligibility.
All passed unanimously

6. ELIGIBILITY LISTS TO BE APPROVED

- A. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve a Merged Eligibility List for Accounting Assistant, SR 40, Open/Promotional-Dual Certification, update effective as of 11/09/19.
- B. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for Grounds Supervisor, Supervisory Salary Range 6, Open/Promotional, eligibility from 12/06/19.
- C. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for Learning Commons Technician II, SR-42, Promotional Only, eligibility from 12/20/19.
- D. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for Learning Commons Technician I, SR-40, Open/Promotional-Dual Certification, effective from 1/08/20.
- E. It was moved by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to approve an Eligibility List for School Plant Supervisor-Middle School, SR 39, Promotional Only, eligibility from 1/09/20.
All passed unanimously

DISCUSSION/INFORMATION ITEMS (See Supplements)

7. CLASSIFICATIONS REVIEWS

- A. Locksmith
Motion by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to revise the class description for Locksmith, SR 47 as proposed.
- B. Student Health Care Specialist
Motion by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to establish the classification of Student Health Care Specialist and approve the job description as proposed.
Motion by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to recommend to the SDUHSD Board of Education allocation of the classification of Student Health Care Specialist to Range 38 of the Classified Employees Salary Schedule.
- C. Secretary, Athletics
Motion by JEFF CHARLES, seconded by JUSTIN CUNNINGHAM, to retain the classification of Secretary, SR 36, for positions supporting the Athletic Program at an assigned high school.
All passed unanimously

8. STAFF COMMENTS ON PERSONNEL ACTIVITIES

Director Dixon has been invited to present to the Board of Education at their February meeting. She will describe the functions and processes under the Merit System for Classified Personnel.

- A. Vacancy Report
B. Personnel List Report
C. Other

9. CORRESPONDENCE – None.

10. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised during public comments except to 1) acknowledge receipt of the information, 2) refer to staff for further study, or 3) refer the matter to the next agenda

- A. California School Employees Association- April Llamas announced she is the new CSEA President.

- B. San Dieguito Union High School District – None
- C. Public – Carmen Blum provided a list of employees who can speak Spanish.

11. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, February 11, 2020, at 3:30 P.M. at San Dieguito UHSD office, 710 Encinitas Boulevard, Encinitas, CA 92024.

12. ADJOURNED – 3:50 PM

San Dieguito Union High School District
Personnel Commission
Eligibility List
Open/Promotional - Dual Certification

Nutrition Services Assistant I

Updated: 1/16/2020
Continuous Filing

San Dieguito Union High School District
Personnel Commission
Nutrition Services Assistant I
Eligibility List - Continuous Filing
Open/Promo-Dual Certification

Please note: Individual eligibility is valid for 6 months.
Scores are merged each time the exam is administered.

<i>Applicant ID</i>	<i>Rank</i>	<i>Eligibility Expires</i>
4521261	1	2/20/2020
3620492	2	7/16/2020
6161742	3	7/16/2020
6218767	4	7/16/2020

S. Dixon

San Dieguito Union High School District
Personnel Commission
Instructional Assistant Special Education - Non-Severe
Eligibility List - Continuous Filing
Open/Promo-Dual Certification

Please note: Individual eligibility is valid for 6 months.
Scores are merged each time the exam is administered.

<i>Applicant ID</i>	<i>Rank</i>	<i>Eligibility Expires</i>
5387354	1	5/12/2020
6227133	2	7/27/2020
4496183	2	3/12/2020
2567270	3	7/27/2020
5872609	4	7/27/2020
3704671	5	3/12/2020
2387690	6	3/12/2020
3686506	7	5/12/2020

S. Dixon

San Dieguito Union High School District
Personnel Commission
Eligibility List
Secretary
Open/Promo-Dual Certification
Eligibility Expires: 7/27/2020

<i>Applicant ID</i>	<i>Rank</i>	
3336935	1	
2986293	2	
6225467	2	
1018850	3	
1481750	3	
5387354	4	
3586358	5	
4500203	6	
3626342	6	
5801773	6	
6156234	7	
3916433	8	
6225483	9	
2821796	10	
5387809	11	
6279975	12	
3264849	12	
3558969	13	
4473542	14	
2866271	14	
6161456	15	

S. Dixon

San Dieguito Union High School District
Personnel Commission
Director of Transportation
Eligibility List
Open/Promo-Dual Certification

Effective: 1/29/2020
Expiration: 7/29/2020

<i>Applicant ID</i>	<i>Rank</i>
3355870	1
1859651	2
6284850	3
6291405	4

S. Dixon

San Dieguito Union High School District

Personnel Commission

School Bus Driver

Eligibility List - Continuous Filing

Open/Promo-Dual Certification

Please note: Individual eligibility is valid for 6 months.

Scores are merged each time the exam is
administered.

Updated: 1/30/2020

<i>Applicant ID</i>	<i>Rank</i>	<i>Eligibility Expires</i>
3041077	1	2/28/2020
6279664	2	7/30/2020

S. Dixon

Classification Review Report	
Classifications	Accounting Specialist and Budget Analyst
Classification Type	Classified
Salary Range	52
Prepared By	Barbara Bass, Human Resources Analyst Susan Dixon, Director, Classified Personnel
Submission to Classification Advisory Committee	January 21, 2020
Submission to Personnel Commission	February 11, 2020
Agenda Item	Classification Review: Reorganization of Duties, Merging of classifications

Background Information

Personnel Commission staff has been meeting with the Director of Fiscal Services over the last several months to update the job descriptions for all classifications in the Finance Department since the last updates were from 2001. Description updates for Accounting Specialist and Budget Analyst were the final two waiting to be updated and were in the process of being discussed when an incumbent in the Budget Analyst classification announced her upcoming retirement. Due to the upcoming retirement, the Director has taken this opportunity to review the flow of work and current needs within the department and has determined that a single classification which encompasses both classifications of Accounting Specialist and Budget Analyst is a better option for the department. Incumbents in these classifications are already performing a combination of accounting and budgeting duties and the consolidation of the two classifications will provide the opportunity for more flexibility in assigning duties and improve the flow of work. A job description for a combined classification of Accountant is attached. The salary for this classification would remain at Range 52 on the Classified Employee Salary Schedule since the function of this assignment is consistent with the current classifications and a study of similar jobs in our comparison districts shows our salary is competitive.

Sources of Information

Dawn Campbell, Director of Fiscal Services
 Comparable districts in San Diego County

Salary Compensation Review

A review of salary rates of comparable classifications within the designated comparison districts is below:

District	Salary Range	Job Title	Min	Max
Carlsbad USD	30	Accountant	\$26.03	\$31.64
Escondido USD	43	Accountant	\$23.60	\$28.69
Grossmont UHSD	56	Accountant	\$29.46	\$37.51
Oceanside USD	35	Accountant	\$25.04	\$29.97
Poway USD	41	Accountant I	\$25.32	\$34.84
Ramona USD	35	Sr. Accountant	\$23.26	\$27.63
San Marcos USD	80	Accountant	\$24.99	\$31.94
Sweetwater UHSD	65	Accountant	\$29.04	\$35.72
Vista	63	Accountant	\$29.03	\$39.05
Average			\$26.20	\$33.00
SDUHSD	52	Accountant	\$28.23	\$37.92

Recommendation

Establish a new classification of Accountant as outlined in the attached job description.

Recommend to the SDUHSD Board of Education allocation of the classification of Accountant to Range 52 of the Classified Employee Salary Schedule.

Abolish the classifications of Accounting Specialist and Budget Analyst.

Reclassify employees currently classified as Accounting Specialist and Budget Analyst to the classification of Accountant.

Note for Minutes: This action is the result of combining two existing classifications. Employees reclassified to Accountant will retain the seniority date established in the classification of Accounting Specialist or Budget Analyst and will not serve a probationary period in the classification of Accountant.

Vote by Committee Members:

Vote	Member	Vote	Member
Yes	Matt Colwell, CSEA	Yes	Debbie Kelly, Admin
Yes	Margy Lara, CSEA	Yes	Marley Nelms, Admin
Yes	April Llamas, CSEA	Yes	Tina Peterson, Admin

CLASSIFIED

ACCOUNTANT

JOB SUMMARY

The Accountant performs professional accounting duties including the preparation, analysis, auditing and reconciling of accounts, funds, budgets, and reports. The Accountant performs accounting duties in compliance with rules, regulations and standards associated with general accounting principles and practices.

REPRESENTATIVE DUTIES

The position description describes the general nature of work performed.

ESSENTIAL FUNCTIONS

The Accountant may perform any combination of the following:

- Review, analyze, reconcile, and audit a variety of accounts, funds and budgets.
- Prepare, review, and audit financial reports related to income, expenditures, accounts, budgets, and programs; ensures the accuracy and compliance with established procedures and Generally Accepted Accounting Principles (GAAP).
- Analyze, audit, reconcile, adjust, and update categorical and other District funds and accounts.
- Calculate, post, audit, code and adjust journal entries.
- Initiate and process account and budget transfers and other transactions as needed.
- Assist with budget preparation (e.g., prepare revenue, expenditure and cash flow forecasts and projections); analyze costs and provide budget allocations, limits and expenditure recommendations.
- Respond to requests for information from District employees related to accounts, budgets, regulations, policies, procedures and issues.
- Perform internal audits and prepare documentation mandated by government agencies; reconcile financial statements prepared by outside agencies; ensure financial statements, transactions and account balances match District reports; prepare, reconcile and adjust accruals.
- Participate in the review, analysis, development and implementation of accounting systems and procedures.
- Assist in maintaining position control, review personnel requisitions, hourly work, stipends and other personnel expenses.
- Train and provide work direction and guidance to designated Accounting staff; review work for accuracy, completeness and compliance with policies, procedures and regulations.
- Performs other job-related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE OF:

- Principles, practices, procedures, codes, rules, and regulations related to accounting transactions.
- Preparation and analysis of complex financial statements and reports.
- Preparation, review and control of assigned accounts.
- Financial and statistical record-keeping techniques.
- General accounting, budget and business functions of a school district.
- Budget practices regarding monitoring and control.
- Financial analysis and projection practices.
- Interpersonal skills using courtesy and tact.

CLASSIFIED

ACCOUNTANT

- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Business writing, proofing and editing.

ABILITY TO:

- Perform a variety of technical accounting duties including the review, analysis, auditing, reconciling, maintaining and adjusting District accounts, funds, budgets, and reports.
- Maintain accurate financial and statistical records.
- Prepare and analyze accounting reports and statements.
- Identify, investigate and resolve financial errors and discrepancies.
- Monitor and audit revenue and expenditures.
- Calculate, post, audit, code and adjust journal entries.
- Initiate and process account and budget transfers and other transactions.
- Assist with budget preparation.
- Respond to inquiries from District personnel and provide accounting-related information.
- Perform internal audits and prepare documentation for government agencies.
- Prepare, reconcile and adjust accruals.
- Provide analysis, review and recommendations regarding accounting systems and procedures.
- Assist in maintaining position control and review and approve personnel requisitions, hourly work, stipends and other personnel expenses.
- Plan, prioritize and organize work, meeting schedules and timelines.
- Understand and resolve issues, complaints and problems.
- Exercise appropriate judgment when making decisions.
- Respond effectively to requests and inquiries from employees, vendors, and other stakeholders.
- Communicate effectively both orally and in writing.
- Use current, up-to-date computer-based applications including accounting systems, word processing, databases, spreadsheets, calendars and e-mail to perform job duties efficiently.
- Establish and maintain cooperative and effective working relationships with others.
- Handle confidential information in a discreet, professional manner.
- Complete tasks thoroughly, accurately and with attention to detail.
- Train and provide work direction and guidance to designated personnel.

EDUCATION AND EXPERIENCE

Three years of increasingly responsible experience in Accounting, including experience reviewing, analyzing, reconciling, maintaining and adjusting accounts, funds, budgets and reports. A bachelor's degree in Accounting or related field may be considered in lieu of up to one year of the three years of increasingly responsible experience.

DISTINGUISHING CHARACTERISTICS

The **Accountant** performs a variety of technical accounting duties related to the review, analysis, auditing, reconciling, maintaining and adjusting of District accounts, funds, budgets, and reports. The Accountant trains and provides work direction and guidance to Accounting staff.

Differentiation between the Accountant and the Accounting Technician, the position below the Accountant, is distinguished as follows:

CLASSIFIED

ACCOUNTANT

The **Accounting Technician** is responsible for processing, recording and auditing various transactions and preparing, reconciling and maintaining a variety of financial and statistical records, reports and statements.

REQUIRED TESTING

Pre-employment testing and assessment is required in order to demonstrate the minimum qualifications for the position.

CERTIFICATES

None

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.

WORKING ENVIRONMENT

The usual and customary methods of performing the job functions require the physical demands outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Physical Demands: Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

Seldom	stooping/bending, squatting/crouching, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	walking, standing, lifting 11-25 lbs. at waist height, carrying 11-25 lbs. up to 25 feet, lifting up to 10 lbs. overhead or at shoulder height, carrying up to 10 lbs. up to 25 feet
Occasionally/Frequently	handling/simple grasping, sitting, neck flexion/rotation, fingering/fine manipulation, reach below shoulder

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability is required to communicate with students, staff, parents, and to respond to telephone calls, safety bells and emergencies. Vision ability is required to see near, distant, color, depth and peripherally.

ENVIRONMENTAL CONDITIONS

None

ACCOUNTING SPECIALIST

OVERALL JOB PURPOSE STATEMENT

The job of Accounting Specialist is done for the purpose of overseeing and coordinating the work of accounting clerks; performing difficult accounting technical work requiring independent judgment and knowledge related to District financial procedures; performing clerical tasks related to these assignments.

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: Positions in the fiscal series ensure proper processing of accounting and budgeting data and provide necessary financial information to management. They provide for timely delivery of checks, payroll, billing invoices and other accounting-related records, reports and materials and provide audit trails and assist in resolving accounting-related issues and disputes. The Accounting Specialist is an advanced-level classification which performs responsible and complex accounting functions requiring in-depth knowledge concerning technical application of accounting and accounting control principles. Positions in this class operate with significant freedom to act independently within the scope of the established accounting system, are typically assigned complete responsibility for specific accounting functions, oversee and coordinate the assignments and work of Accounting Assistants and serve as a technical advisor to the Controller on financial system development and implementation. This class differs from the Accounting Assistant class which performs accounting and related clerical work of above average difficulty requiring independent judgment over an established function such as accounts payable. The Accounting Specialist differs from the Accounting Technician which is responsible for performing the accounting functions of a department or major program and differs from the Budget Analyst which is responsible for assisting the Controller in the establishment and maintenance of the District's financial systems.

ESSENTIAL FUNCTIONS

- Establishes/maintains statistical and financial information systems, records, files, inventories and other accounting records for the purpose of ensuring proper processing of data and providing necessary information on assigned accounts, programs or special projects.
- Reconciles/audits differences for the purpose of balancing and adjusting accounts, processing documents and providing for a timely delivery of checks, billing invoices and other accounting related materials.
- Prepares/processes documents, data, information and payments (e.g. purchase orders, invoices, salary and benefit forms, etc.) for the purpose of completing financial transactions such as those associated with payments, purchase orders, invoices, salary and benefits, through the financial system.
- Sets up/maintains District accounts and general ledger accounts for the purpose of ensuring comprehensive and accurate accounting of data and transactions for assigned accounts.

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- Posts/assembles/tabulates/compares financial and statistical data for the purpose of maintaining, updating and reconciling accounts, coding purchase orders and encumbering payments with correct budget information.
- Generates/compiles/prepares/distributes statistical and accounting reports, financial statements, and records for the purpose of providing information, obtaining verification of accuracy and/or establishing an audit trail.
- Assists individuals, school districts departments, county, state and other agencies for the purpose of providing information, interpreting and applying accounting rules and regulations, resolving disputes and facilitating accounting operations.
- Documents activities/actions for the purpose of providing accurate record/s and an audit trail.
- Monitors files, budgets, expenditures, and invoices for the purpose of verifying computations, assuring proper authorization and appropriate accounting coding and maintaining audit trail.
- Attends in-services, classes, workshops, conferences for the purpose of implementing new policies and procedures in the District.

OTHER FUNCTIONS

- Performs other related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: concepts of grammar and punctuation; accounting practices and procedures; applicable sections of State Education Codes and other federal, state, county and district laws, policies, rules and regulations.

SKILLS are required to perform multiple technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; preparing and maintaining accurate records; and performing accounting procedures.

ABILITY is required to schedule activities; routinely gather, collate, and/or classify data; and use basic job related equipment. Flexibility is required to work with others under a wide variety of circumstances; analyze data utilizing various processes some of which may be undefined; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: communicating with diverse groups; maintaining

CLASSIFIED

confidentiality; meeting deadlines and schedules; working as part of a team; and working with detailed information/data.

RESPONSIBILITY

Responsibilities include: working under limited supervision focusing primarily on results; directing other persons within a small work unit; and monitoring the use of funds. Significant utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

WORKING CONDITIONS

The usual and customary methods of performing the job's functions requires the following physical demands: some lifting, carrying, pushing and/or pulling; some climbing and balancing; some stooping, kneeling, crouching and/or crawling; significant reaching, handling, fingering and/or feeling. Generally the job requires 80% sitting, 5% walking and 15% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.

EDUCATION

High School Diploma or equivalent supplemented by courses in bookkeeping and accounting.

EXPERIENCE

Three years of increasingly responsible experience in financial or statistical record keeping at least one year of which must have been in a school district.

REQUIRED TESTING

None Specified

CERTIFICATIONS AND LICENSING

None Specified

Continuing Education/Training

None Specified

OTHER REQUIREMENTS

Criminal Justice/Fingerprint Clearance; TB Clearance

BUDGET ANALYST

OVERALL JOB PURPOSE STATEMENT

The job of Budget Analyst is done for the purpose of performing difficult and very complex accounting and auditing duties in assisting the Controller in the preparation and maintenance of budgets, financial reports and accounting records.

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: Positions in the fiscal series ensure proper processing of accounting and budgeting data and provide necessary financial information to management. They provide for timely delivery of checks, payroll, billing invoices and other accounting-related records, reports and materials and provide audit trails and assist in resolving accounting-related issues and disputes. The Budget Analyst is an advanced-level technical and specialized classification that performs responsible and highly complex functions to assist the Controller in the establishment and maintenance of the District's financial systems including budget development and control for general and other funds. This position works with considerable independence and has overall responsibility for the soundness and reliability of the technical aspects of the budgeting and financial control systems and through presentation of training programs and oversight roles for ensuring adherence to District and other applicable financial standards as well as for relating the financial system to other key systems such as payroll and personnel. This class differs from the Accounting Technician which is an advanced-level class performing responsible and complex accounting functions requiring in-depth knowledge concerning technical application of accounting and accounting principles and are typically assigned complete responsibility for specific accounting functions of departments or special programs.

ESSENTIAL FUNCTIONS

- Assists the Controller and district managers with technical accounting issues for the purpose of preparing and analyzing information and data for developing the budget and implementing and controlling the annual budget and preparing periodic budget revisions.
- Attends in-services, classes, workshops, conferences (e.g. monthly, CASBO, etc.) for the purpose of providing the District with new policies and procedures.
- Audits various accounts, records and systems for the purpose of identifying discrepancies, resolving problems and issues and ensuring conformity to State and district accounting requirements (e.g. ASB accounts).
- Authorizes/assigns program budget numbers, object numbers, income numbers and balances for the purpose of maintaining chart of accounts and financial records and systems in compliance with district and county guidelines, policies and procedures.

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- Compiles/organizes data on special funds (e.g. capital facilities) for the purpose of monitoring and reporting fund activities, transactions and balances.
- Coordinates work among clerical staff of the finance office during vacations and absences for the purpose of ensuring continuous work flow and meeting deadlines by adjusting assignments and schedules as needed.
- Coordinates communication between the business office and various district departments and schools for the purpose of providing information related to financial accounting procedures, policies and requirements and for reconciling major databases and systems (e.g. personnel rosters and position control system).
- Develops/prepares special and regular reports for the purpose of extracting and summarizing budget and financial data from the financial systems for management and school board information needs and decision-making and for meeting state reporting requirements.
- Plans/prepares/conducts annual workshop for the purpose of training all school site and district office clerical staff on current and revised budget and accounting procedures.

OTHER FUNCTIONS

- Performs other related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE is required to perform basic math; read technical information; compose a variety of documents and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: concepts of grammar and punctuation; principles, practices and procedures of accounting including budget development, payroll, accounts payable and accounts receivable; applicable sections of State Education Codes and other federal, state, county and district laws, policies, rules and regulations.

SKILLS are required to perform multiple technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records; compile and analyze financial and statistical information and data.

ABILITY is required to schedule a number of activities; routinely gather, collate and/or classify data; and use basic, job-related equipment. Flexibility is required to work with others under a

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variety of circumstances; analyze data utilizing various processes some of which may be undefined; and operate equipment using defined methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job-related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is limited to moderate. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups; maintaining confidentiality; meeting deadlines and schedules; working as part of a team; and working with detailed information/data.

RESPONSIBILITY

Responsibilities include: working under limited supervision focusing primarily on results; leading, guiding and/or coordinating other persons; and monitoring the use of funds. Significant utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

WORKING ENVIRONMENT

The usual and customary methods of performing the job's functions requires the following physical demands: some lifting, carrying, pushing, and/or pulling; some climbing and balancing; some stooping, kneeling, crouching, and/or crawling; and significant reaching, handling, fingering and/or feeling. Generally, the job requires 75% sitting, 5% walking and 20% standing. The job is performed under minimal temperature variations, a generally hazard-free environment, and in a clean atmosphere.

EDUCATION

High School Diploma or equivalent supplemented by course work in accounting.

EXPERIENCE

Three years of accounting clerical experience in a school district environment.

REQUIRED TESTING

None Specified

CERTIFICATES AND LICENSES

None Specified

CONTINUING EDUCATION/TRAINING

CLASSIFIED

None Specified

CLEARANCES

Criminal Justice/Fingerprint Clearance; TB Clearance

SAN DIEGUITO UNION HIGH SCHOOL DISTRICT VACANCY REPORT 2/06/20

Classified Personnel

11 current/pending vacancies in 10 different job classifications

SITE	SLOT	JOB TITLE	Hrs/Wk	FTE	STATUS
OC	AM756	Custodian	40	1.00	Selection interview March 2020
SDA	AL907	Custodian	40	1.00	Selection interview March 2020
FAC	AA165	Floater Custodian	40	1.00	Selection interview March 2020
CCA	AE650	Secretary	19.5	0.49	Selection interview February 12, 2020
FAC	AA204	Locksmith	30	0.75	Selection interview February 2020
TECH	AA036	Administrative Assistant II	40	1.00	Selection interview March 2020
TRANS	AI895	School Bus Driver	20	0.50	Continuous recruitment
CV	AJ224	Instructional Assistant SpEd Non-Severe	30	0.75	Continuous recruitment
TRANS	AM728	Director of Transportation	40	1.00	Selection interview 1/31/20
DO	AM729	Communications Coordinator	40	1.00	Selection interview February 2020
LCC	AG366	Instructional Assistant SpEd Severe	30	0.75	Selection interview February 2020

PERSONNEL LIST

CLASSIFIED PERSONNEL

Employment

1. **Classified Artist in Residence**, employment for the 2019-20 school year per attached supplement through 06/30/20.
2. **Coaches**, employment for the 2019-20 school year per attached supplement through 06/30/20.
3. **Bertocchini, Matthew**, Information Technology Support Technician, SR51, 100.00% FTE, Earl Warren Middle School - Technology Department, effective 01/06/20.
4. **Ramirez, Iban**, Information Technology Support Technician, SR51, 100.00% FTE, Earl Warren Middle School - Technology Department, effective 01/06/20.
5. **Shapiro, Jane**, Accounting Assistant, SR40, 100.00% FTE, District Office - Finance Department, effective 01/06/20.
6. **Stinson, Santos**, School Bus Driver, SR38, 50.00% FTE, Transportation Department, effective 01/06/20.

Change in Assignment

1. **Crosby, Kalani**, from Administrative Assistant II, SR40, 100% FTE, Earl Warren Middle School - Technology Department to Administrative Assistant IV, SR44, 100.00% FTE, San Dieguito High School Academy, effective 12/09/19.

Release from Probation

1. **Employee Number 531-409**, Nutrition Services Assistant I, SR25, 31.25% FTE, Carmel Valley Middle School, effective 12/12/19.

Resignation

1. **Caron, Diane**, Secretary, SR36, 100.00% FTE, Earl Warren Middle School, for the purpose of retirement, effective 12/30/19.

PERSONNEL LIST

CLASSIFIED PERSONNEL SUPPLEMENT

Classified Artist in Residence- Canyon Crest Academy

Blanchard, Ralph, Conservatory, effective 12/4/2019

Leitner, Serena, Digital Design, effective 12/11/2019

Coaches

Canyon Crest High School Walk-On

Davis, Taylor, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/10/2019

De La Vega, Luis, Boys Track, Varsity Assistant, Spring Season, effective 12/10/2019

Geelhoed, Glenn, Girls Track, Varsity Assistant, Spring Season, effective 12/10/2019

Gladden, Frank, Baseball, Freshmen, Spring Season, effective 12/10/2019

Goetz, Sarah, Girls Lacrosse, Junior Varsity, Spring Season, effective 12/10/2019

Goodwin, Nicole, Girls Lacrosse, Junior Varsity Assistant, Spring Season, effective 12/10/2019

Kraszweski, Gabrielle, Girls Lacrosse, Varsity, Spring Season, effective 12/10/2019

Liu, David, Tennis, Varsity Assistant, Spring Season, effective 12/10/2019

Malott, Matthew, Baseball, Varsity Assistant, Spring Season, effective 12/10/2019

Pierce, Jamie, Swim, Varsity Assistant, Spring Season, effective 12/10/2019

Prochnow, Robert, Boys Track, Junior Varsity, Spring Season, effective 12/10/2019

Saunders, Thomas, Boys Volleyball, Varsity, Spring Season, effective 12/10/2019

Schultz, David, Girls Track, Junior Varsity, Spring Season, effective 12/10/2019

Siegel, Alex, Boys Lacrosse, Varsity, Spring Season, effective 12/10/2019

Spire, Gregory, Swim, Varsity, Spring Season, effective 12/10/2019

Steinberg, Jesse, Tennis, Junior Varsity Assistant, (50% Stipend), Spring Season, effective 12/10/2019

Thompson, Ted, Girls Track, Varsity, Spring Season, effective 12/10/2019

Vieth, Michal, Boys Volleyball, Varsity Assistant, Spring Season, effective 12/10/2019

West, David, Baseball, Varsity Assistant, Spring Season, effective 12/10/2019

Ziamba, Lisa, Girls Track, Varsity Assistant, Spring Season, effective 12/10/2019

Canyon Crest High School Certificated

Austin, Holly, Girls Lacrosse, Varsity Assistant, Spring Season, effective 12/10/2019

Black, Christopher, Boys Tennis, Varsity, Spring Season, effective 12/10/2019

Corman, Andrew, Boys Track, Varsity, Spring Season, effective 12/10/2019

Lockhart, Thomas, Boys Golf, Varsity, Spring Season, effective 12/10/2019

Mikkonen, Ryan, Baseball, Varsity, Spring Season, effective 12/10/2019

Reeve, Meredith, Boys Track, Varsity Assistant, Spring Season, effective 12/10/2019

Rose, Sarah, Softball, Junior Varsity, Spring Season, effective 12/10/2019

Wahlstrom, Michael, Softball, Varsity, Spring Season, effective 12/10/2019

La Costa Canyon High School Walk-On

Barroso Palomo, Jose, Baseball, Freshmen, Spring Season, effective 12/19/19
Burke, Edward, Baseball, Junior Varsity Assistant, Spring Season, effective 12/19/19
Carlyle, Karen, Girls Lacrosse, Varsity Assistant, Spring Season, effective 12/19/19
Cooper, Kevin, Boys Lacrosse, Varsity, Spring Season, effective 12/19/19
Dutton, Jonathan, Baseball, Varsity Assistant, Spring Season, effective 12/19/19
Gillan, James, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/19/19
Girley, Dedrick, Boys Track, Junior Varsity, Spring Season, effective 12/19/19
Hill, Jason, Baseball, Varsity Assistant, Spring Season, effective 12/19/19
Mackle, Patricia, Swim, Varsity, Spring Season, effective 12/19/19
McGrath, Bill, Boys Tennis, Varsity, Spring Season, effective 12/19/19
Missailidis, Jasen, Swim, Junior Varsity, Spring Season, effective 12/19/19
Moore, Damon, Track, Junior Varsity Assistant, Spring Season, effective 12/19/19
Murphy, Sean, Boys Volleyball, Varsity Assistant, Spring Season, effective 12/19/19
O'Donnell, Matthew, Boys Track, Junior Varsity, Spring Season, effective 12/19/19
Paulsen, Mark, Baseball, Varsity Assistant, (Stipend 50%), Spring Season, effective 12/19/2019
Simmons, Gregory, Boys Track, Varsity, Spring Season, effective 12/19/19
Simmons, Ryan, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
Sisler, Robert, Track, Varsity Assistant, Spring Season, effective 12/19/19
Steinberger, Jenalin, Swim, Varsity Assistant, (Stipend 23%), Spring Season, effective 12/19/19
Stewart, Jeffrey, Boys Volleyball, Junior Varsity, Spring Season, effective 12/19/19
Wilcox, Lyndsey, Girls Lacrosse, Junior Varsity Assistant, Spring Season, effective 12/19/19
Wright, Rachel, Softball, Varsity, Spring Season, effective 12/19/19

La Costa Canyon High School Certificated

Belitz, Casey, Girls Lacrosse, Varsity, Spring Season, effective 12/19/19
Brubaker, Mark, Boys Volleyball, Varsity, Spring Season, effective 12/19/19
Farr, Chalise, Track, Varsity Assistant, (Stipend 25%), Spring Season, effective, 12/19/19
Machado, Justin, Baseball, Varsity, Spring Season, effective 12/19/19
Seitz, Crystal, Track, Assistant, Spring Season, effective 12/19/19
Solomon, Caitlin, Girls Lacrosse, Junior Varsity, Spring Season, effective 12/19/19
Sovacool, Casey, Boys Golf, Varsity, Spring Season, effective 12/19/19
Vice, William, Girls Track, Varsity, Spring Season, effective 12/19/19
Witzmann, Adam, Track, Junior Varsity Assistant, Spring Season, effective 12/19/19

San Dleguito Academy Walk-On

Aguirre, Jose, Baseball, Freshmen, Spring Season, effective 12/11/2019
Anguiano, Jennifer, Track, Varsity Assistant, Spring Season, effective 12/11/2019
Bennett, David, Swim, Varsity, Spring Season, effective 12/11/2019
Corrao, Salvatore, Softball, Varsity, Spring Season, effective 12/11/2019
Edwards Steven, Boys Track, Varsity, Spring Season, effective 12/11/2019
Fitchett, Michael, Boys Track Junior Varsity, Spring Season, effective 12/11/2019
Fletes, Carlos, Baseball, Varsity, Spring Season, effective 12/11/2019
Glass, Hank, Track, Varsity Assistant, Spring Season, effective 12/11/2019

San Dleguito Academy Walk-On, cont.

Grah, Gunnar, Boys Volleyball, Junior Varsity, Spring Season, effective 12/11/2019
Haskett, Gordon, Girls Track, Varsity, Spring Season, effective 12/11/2019
Hoff, Taylor, Boys Volleyball, Varsity Assistant, Spring Season, effective 12/11/2019
Holguin, Jay, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/11/2019
Kaczmarek, Charles, Girls Lacrosse, Varsity, Spring Season, effective 12/11/2019
Martinez, Thomas, Baseball, Junior Varsity, Spring Season, effective 12/11/2019
Nelums, Andrew, Baseball, Freshmen, Spring Season, effective 12/11/2019
Pecoraro, John, Baseball, Varsity Assistant, Spring Season, effective 12/11/2019
Pinchin, Landon, Boys Lacrosse, Junior Varsity, Spring Season, effective 12/11/2019
Thaisz, Richard, Boys Lacrosse, Varsity, Spring Season, effective 12/11/2019
Tomasi, Joseph, Boys Tennis, Varsity, Spring Season, effective 12/11/2019
Wilson, Raymond, Boys Volleyball, Varsity, Spring Season, effective 12/11/2019
Zamora, Alfred, Boys Golf, Varsity, Spring Season, effective 12/11/2019
Zeglen, Brian, Softball, Junior Varsity, Spring Season, effective 12/11/2019

San Dleguito Academy Certificated

Fletes, Leo, Baseball, Junior Varsity Assistant, Spring Season, effective 12/11/2019
Meyer-Abrahamson, Deborah, Boys Tennis, Junior Varsity, Spring Season, effective 12/11/2019
Reitz, Daniel, Baseball, Varsity Assistant, Spring Season, effective 12/11/2019

Torrey Pines High School Walk-On

Bath, Ryan, Boys Track, Varsity, Spring Season, effective 12/13/2019
Connors, Kelly, Girls Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
DeFrancesco, Paul, Baseball, Junior Varsity, Spring Season, effective 12/13/2019
DeJesus, Kelsey, Girls Lacrosse, Junior Varsity, Spring Season, effective 12/13/2019
Dennis, Sydney, Girls Lacrosse, Junior Varsity, Spring Season, effective 12/13/2019
Doucette, Kaitlin, Girls Lacrosse, Varsity, Spring Season, effective 12/13/2019
Epple, Garrett, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
Heningburg, Jules, Boys Lacrosse, Junior Varsity Assistant, Spring Season, effective 12/13/2019
Jasper, Stephen, Boys Volleyball, Junior Varsity, Spring Season, effective 12/13/2019
Kobik, Armani, Swim, Junior Varsity Assistant, Spring Season, effective 12/13/2019
McKinnon, Kacey, Girls Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
Moore, Brian, Boys Track, Junior Varsity Assistant, Spring Season, effective 12/13/2019
O'Neil, David, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
Parker, Jennifer, Gymnastics, Varsity, Spring Season, effective 12/13/2019
Ray, Richard, Baseball, Varsity Assistant, Spring Season, effective 12/13/2019
Rubacky, Nicholas, Boys Volleyball, Varsity Assistant, Spring Season, effective 12/13/2019
Winterfeldt, Brian, Boys Lacrosse, Varsity Assistant, Spring Season, effective 12/13/2019
Zissi, Jonathan "Jono", Boys Lacrosse, Varsity, Spring Season, effective 12/13/2019
Zuffinetti, Adam, Boys Volleyball, Varsity, Spring Season, effective 12/13/2019

Torrey Pines High School Certificated

Ashby, Jake, Girls Track, Junior Varsity Assistant, Spring Season, effective 12/13/2019
Ashby, Scott, Softball, Varsity Assistant, Spring Season, effective 12/13/2019
Chess, Matthew, Boys Golf, Varsity Assistant, Spring Season, effective 12/13/2019
Contreras, Richard, Swim, Varsity, Spring Season, effective 12/13/2019
Doerrer, Charles "Chas", Boys Track, Junior Varsity, Spring Season, effective 12/13/2019
Drake, Christopher, Boys Golf, Varsity, Spring Season, effective 12/13/2019
Falci-Stevens Charlenne, Girls Track, Varsity, Spring Season, effective 12/13/2019
Hildebrand, Kaitlin, Girls Track, Junior Varsity, Spring Season, effective 12/13/2019
Livingston, Matthew, Baseball, Varsity, Spring Season, effective 12/13/2019
Lona, Francisco, Baseball, Freshmen, Spring Season, effective 12/13/2019
Moore, Jonathan, Softball, Varsity, Spring Season, effective 12/13/2019
Shinto, Stuart, Boys Tennis, Junior Varsity, Spring Season, effective 12/13/2019
Tudor, Kenyon, Swim, Junior Varsity, Spring Season, effective 12/13/2019
Wade, Austin, Boys Volleyball, Freshmen, Spring Season, effective 12/13/2019
Wickman, Ryland, Softball, Junior Varsity, Spring Season, effective 12/13/2019