

## **CLOVIS UNIFIED SCHOOL DISTRICT**

**Position: Financial Specialist**

**Salary Grade: 25**

**Salary Schedule: Classified**

**Department/Site: Budget and Finance**

**Reports to/Evaluated by: Assistant Director of Budget and Finance or Designated Supervisor**

**FLSA: Non-Exempt**

### **SUMMARY**

Under general supervision, the purpose of the job is to perform a variety of accounting, budgetary, and compliance support duties to assist in the financial operations of the Budget and Finance Department. Employees in this job classification function at a paraprofessional level, carrying out assigned tasks according to established procedures, calendars, and department workflows. Work includes supporting budget transfer processing, time and effort reporting, grant and program compliance, and coordination with State and federally funded program staff.

### **DISTINGUISHING CAREER FEATURES**

The Financial Specialist is generally regarded as a support-level position within the Budget and Finance Department, working below the Financial Analyst classification. Positions in this classification apply working knowledge of governmental accounting principles, budget processes, and categorical program compliance. The Financial Specialist exercises sound judgment and attention to detail in processing financial transactions, maintaining documentation for audit readiness, and communicating with program staff. Problem challenges are procedural and transactional in nature; human relations challenges involve the routine exchange of information and coordination with site and program contacts.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Processes budget transfer requests and expense transfer journal entries for assigned District funds and programs. Verifies appropriate account coding, fund availability, and authorization in accordance with department procedures and District policies.
- Supports the time and effort reporting function for federally funded and restricted fund employees; and collects, reviews, and maintains semi-annual certifications and periodic activity records to ensure compliance with federal and State audit requirements.
- Assists with financial and administrative functions of the Medi-Cal LEA Billing Option Program, including maintaining documentation for audit compliance, tracking billing activity, and supporting communications with program staff and the Financial Analyst.
- Assists with financial and administrative functions of the Child Youth Behavioral Health Initiative (CYBHI) program; maintains supporting documentation; monitors expenditure activity, and coordinates compliance-related communications under the direction of the Financial Analyst and Assistant Director.

- Manages assigned fee-based and self-contained grants; monitors revenue and expenditure activity; maintains accurate records; prepares periodic budget status updates; and ensures compliance with applicable grant requirements and District policies.
- Prepares, audits, and maintains a variety of financial and administrative records, reports, and supporting documentation related to assigned programs and funds; and ensures files are organized and audit-ready at all times.
- Communicates with site administrators, program coordinators, and department staff regarding budget balances, transfer requests, reporting deadlines, and documentation requirements; provides clear and accurate information in response to inquiries.
- Assists in preparing instructional materials and reference documents for program staff regarding fiscal compliance, documentation requirements, and reporting timelines.
- Reviews and processes a variety of financial transactions in the District's financial system; and verifies coding accuracy and maintains supporting documentation consistent with internal controls.
- Performs other duties as required to accomplish the objectives of the position.

## **QUALIFICATIONS**

### **Knowledge and Skills:**

- Working knowledge of governmental accounting principles and practices, including fund accounting and categorical program compliance.
- Working knowledge of budget transfer processes, journal entries, and expenditure tracking in an automated accounting/ERP system.
- Familiarity with federal and State grant compliance requirements, including time and effort reporting for federally funded positions.
- Working knowledge of records management practices and audit documentation requirements.
- Well-developed written and oral communication skills; and possesses the ability to prepare clear reports, correspondence, and procedural documentation.
- Proficiency with PC-based spreadsheet and word processing applications; and working knowledge of relational databases and financial reporting tools.
- Sufficient human relations skills to communicate effectively and professionally with staff at all levels, both inside and outside the department.

### **Abilities:**

- Ability to process financial transactions accurately and in accordance with established procedures and internal controls.
- Ability to maintain organized and audit-ready documentation for assigned programs and funds.
- Ability to manage multiple tasks and deadlines in a fast-paced environment with attention to detail.
- Ability to interpret and apply program guidelines, regulations, and procedural requirements to day-to-day work.

- Ability to work collaboratively and communicate technical information clearly to non-finance staff.

**Physical Abilities:**

- Requires sufficient hand-eye-arm coordination to use a keyboard and 10-key, plus arm/hand movements to retrieve work materials and operate a variety of general office equipment.
- Requires visual acuity to read words and numbers.
- Requires auditory ability to carry on conversations over the phone and in person.

**Working Conditions:**

- Work is performed indoors where minimal safety considerations exist.

**Education and Experience:**

- Associate's Degree in accounting, business administration, or a related field, supplemented by five (5) years of experience in an accounting, budgeting, or fiscal support capacity. Additional experience may substitute for some higher education.

**Licenses and Certificates:**

- Requires a valid driver's license.