

Job Description

Job Title: Secretary V Business Services

Exemption Status/Test: Non-Exempt/Aux

Reports to: Chief Financial Officer

Date Revised: 11/7/2025

Dept./School: Business & Financial Support Services

Pay Grade: AS6 / 226A

Primary Purpose:

To assist the Chief Financial Officer and Director of Financial Services so that they may devote maximum attention to the operation of the district.

Qualifications:

Education/Certification:

Must possess a high school diploma or hold a general education degree (GED) certificate. Must have three years experience as a public school secretary, or five years of general clerical/secretarial experience, or 30 semester hours of college credit with some business orientation or equivalent business school training.

Special Knowledge/Skills:

To perform this job successfully, an individual must be able to perform each of the major responsibilities and duties satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. There may alternatives to the qualifications as the Board of Trustees may find appropriate.

Major Responsibilities and Duties:

Places and receives telephone calls, records messages. Keeps Chief Financial Officer informed.

Processes all incoming and outgoing mail including confidential correspondence.

Assesses need, orders and maintains supplies, materials, and equipment needed.

Performs any bookkeeping tasks associated with the specific position.

Manages the budget for the CFO's office and Director of Financial Services office as well as tracks all expenditures.

Assist with support schedules, data collection, and preparation of Impact Aid application.

Maintains filing systems and searches files for specific information.

Prepares correspondence and reports as instructed.

Maintains a schedule of appointments and makes arrangements for conferences.

Greets visitors and ascertains nature of business.

Utilizes office technology and automation to complete tasks and operates office machines such as computers, copier/printer, calculator, as well as monitor inventory.

Makes necessary arrangements for meetings including date, location, and time; contacting those who need to attend; and sees that all materials are prepared on matters to be discussed.

Accepts responsibilities for making office reports and supervising the office operations.

Makes routine decisions in accordance with established policies and procedures.

Makes travel arrangements for Chief Financial Officer or Director of Financial Services.

Maintains financial records, prepares necessary purchase orders, professional leave forms, and travel reimbursements.

Interacts and answers questions professionally and appropriately with the public and district staff in person and on the telephone. Tracks necessary follow-up.

Advises the CFO immediately of the existence of any problem deemed to warrant prompt attention.

Performs other such tasks that may be assigned by the Chief Financial Officer.

Supervisory Responsibilities:

This job has no supervisory responsibilities.

Mental Demands/Physical Demands/Environmental Factors:

Tools/Equipment Used: Ability to use peripheral devices, high level language programming concepts, data management software, and application development tools.

Posture/Physical Demands: Prolonged sitting; regular kneeling/squatting, bending/stooping, pushing/pulling, twisting. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to sit and talk or hear, to use hands to finger, handle, or feel, and to stand and walk. The employee is required to regularly lift and carry (less than 15 pounds). Specific vision abilities required by this job include close vision, distance vision, and ability to adjust focus.

Motion: Repetitive hand motion; frequent keyboarding and use of mouse; regular walking, grasping/squeezing, wrist flexion/extension, reaching; may climb ladders.

Lifting: Regular moderate lifting and carrying (up to 44 pounds); occasional heavy lifting and carrying (45 pounds and over).

Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Occasional district-wide travel to multiple campuses, as assigned. The noise level in the work environment is usually moderate.

Mental Demands: Work with frequent interruptions; emotional control under stress.

This document describes the general purpose and responsibilities assigned to this job and is not an exhaustive list of all responsibilities and duties that may be assigned or skills that may be required.