

Business Assistant

DEPARTMENT:	Finance	REPORTS TO:	Chief Financial Officer
WORK SCHEDULE:	12 months	COMPENSATION:	Support Staff Salary Schedule
FULL/PART TIME:	Full time	FLSA STATUS:	Exempt

Position Description

Provide administrative, finance, and business support to the Chief Financial Officer and other Finance and Operations staff, advisory committees to the Board of Education, and other executives of the Kirkwood School District to meet regulatory guidelines and deadlines as well as district business requirements. Effectively organize and prioritize multiple projects, objectives and deadlines, and operate with a sense of urgency for some strict deadlines.

Task Title	Essential Job Functions	Percent of Time Spent
Finance Department Administrative Support	<ul style="list-style-type: none"> • Provide administrative support to the Chief Financial Officer (CFO) and Finance Department. • Create, prepare, and edit documents for the CFO and other district executives. • Resolve problems and prioritize workflow for business-related needs within Finance, ensuring deadlines and other departments' needs are met. • Provide front-line response to external community members and all district staff. • Answer and direct phone calls, handle scheduling logistics, coordinate meeting locations, materials, and needs. • Schedule and manage the CFO's calendar including resolving conflicts and competing demands and proactively scheduling important meetings with internal and external individuals. • Reserve conference rooms and procure catering, ensuring that participants have logistical information and meeting materials. • Maintain member and vendor lists with email addresses. • Update/create Business and Finance Policies & Procedures manual for District-wide distribution by compiling information from CFO, Director of Accounting, Payroll Coordinator, and bookkeepers. • Create, prepare, and distribute reference manuals to inform staff how to proceed with financial situations using knowledge and interpretation of the Board of Education policies. • Create legal documents as requested such as tenant letters. • Maintain legal documents and manage according to document retention schedules. 	25%

Task Title	Essential Job Functions	Percent of Time Spent
Finance Process Support	<ul style="list-style-type: none"> ● Prepare and verify documents for the budgeting process to be shared and utilized by the Kirkwood Board of Education, the CFO, the Community Budget and Finance Committee as well as the public, auditors, and financial institutions. ● Collect, compile, and review ongoing internal and external financial data applying analysis and forecasting. ● Utilize Excel spreadsheets to allocate operational budgets to various school levels and operational units. ● Create formal, annual budget book utilizing data from internal and governmental sources, the district's previous budget results, and forecasts of predicted revenues and expenditures. Distribute board-approved book to external financial institutions for compliance validation. ● File financial documents with the bank and send documents to Kirkwood Board of Education for formal approval. ● Review tax rate correspondence with the Missouri State Auditor's Office. Post Tax Rate Hearing Notice in public domain. ● Publish approved financial statements with news outlets. ● Manage purchasing card documents and reporting for various executives. ● Update critical documents with current data and manage the filing process for contracts, time sensitive documents, and compliance filings for municipal markets under SEC's rulings, state compliance requirements reporting with the Secretary of State, and the Department of Elementary & Secondary Education mandates. ● Research and procure special equipment, services, and supplies as requested. ● Coordinate RFP and RFQ requirements. 	20%
Insurance Program Management	<ul style="list-style-type: none"> ● Administer and manage insurance programs (e.g., auto, property, personal injury, treasury bonds, and other general insurance) for the district. ● Monitor, review, and report loss summaries. ● Coordinate employee and vendor compliance. ● Work with insurance provider to coordinate claims. ● Complete related renewal process. ● Collect and disseminate insurance documentation to appropriate parties. ● Obtain event certificates of liability. ● Audit mileage and student ridership with contracted transportation provider to ensure accurate data keeping and continuous coverage for district entities. 	20%
Free and Reduced Price Meal Program Management	<ul style="list-style-type: none"> ● Manage Free & Reduced Price meal program for the district. ● Adhere to state guidelines governing the application, certification and verification of applicants to the program. ● Submit appropriate information to program officials. 	20%

Task Title	Essential Job Functions	Percent of Time Spent
	<ul style="list-style-type: none"> ● Determine eligibility of participants and disseminate participant information throughout district software and communication channels to ensure confidentiality is maintained. ● Participate in the scheduled RFP process for food service providers and provide information and communication to ensure the appropriate vendor is selected. 	
Committee Coordination and Communication	<ul style="list-style-type: none"> ● Coordinate district finance- and operations-related committees to ensure compliance with district policy, state, and federal laws. ● Create and disseminate minutes, schedules, materials and committee membership. ● Provide appropriate communication to all stakeholders, including posting dates and times for public notification. 	10%
Website Content Management	<ul style="list-style-type: none"> ● Create, design, and maintain the district's website content including its webpages for finance, food services, and requests for proposals and the related pages associated with them. ● Update with monthly financial statements, budget amendments, RFP or RFQs, meeting dates, team member contact information, District ASBR and audited financial statements. ● Create new pages for special projects. Manage and coordinate special projects as requested by the chief financial officer. 	5%

The intent of this job description is to provide a representative description of the types of duties and responsibilities required for this position. Employees may be asked to perform other job-related duties as assigned.

Supervisory Responsibilities

- **Supervisory Responsibility:** None
- **Supervisory Activities:** None
- **Budget Signing Authority:** None
- **Decision-making Authority:** Decisions impact a small team or program

Qualifications

Required

- **Education and Related Work Experience:** The following combinations meet the minimum requirements:
 - Bachelor's degree in finance, accounting, or a related field and 3 years of related work experience.
 - Two years of college/associate degree in finance, accounting, or a related field and 5 years of related work experience.
- Valid Missouri driver's license

Knowledge & Skills

Knowledge

- **Basic:**

- Accounting: Accounting principles, practices, and the analysis and reporting of financial data
- Safety/Security: Equipment, policies, and procedures for the protection of people, data, property, and the organization.
- **Intermediate:**
 - Administrative: Administrative and office procedures, functions and basic office tasks.
 - Computers/IT: Electronic equipment, and computer hardware and software, including applications and tools for finance
 - Customer and personal service: Principles and processes for providing customer and personal services.
 - Law/government: Relevant local, state, and national laws and government regulations including KSD Board of Education policy
 - Management: Business/management principles involved in strategic planning, resource allocation, leadership, and coordination of people and resources.

Skills

- **Constantly (More than 5.6 hours or 69% of the day):** Active Learning, Reading Comprehension, Speaking, Time Management, Writing
- **Frequently (Between 2.6 hours and 5.5 hours or 33% to 68% of the day):** Active Listening, Coordination, Critical Thinking, Instructing, Learning Strategies, Mathematics, Service Orientation, Social Perceptiveness
- **Occasionally (Up to 2.5 hours or 32% of the day):** Financial Management, Judgement/Decision-Making, Management of Financial Resources, Management of Material Resources,
- **Rarely (Less than 1 hour or 12% of the day):** Complex Problem Solving, Monitoring, Negotiation, Persuasion, Quality Control Analysis

Working Conditions

Physical Demands

- **Frequently (Between 2.6 hours and 5.5 hours or 33% to 68% of the day):** Sitting, Finger Dexterity, Hearing
- **Occasionally (Up to 2.5 hours or 32% of the day):** Walking
- **Rarely (Less than 1 hour or 12% of the day):** Carrying/Lifting, Climbing, Color Vision, Crawling, Crouching/Kneeling, Multi-limb Coordination, Pulling/Pushing, Reaching, Repetitive motion, Standing

Mental and Psychological Demands:

- *High demands:* The job requires significant mental effort and involves high levels of stress (e.g., Frequent need to deal with difficult customers or manage emotions when interacting with others, often works under tight deadlines, exposure to public criticism, regularly requires extended periods of concentration on complex tasks).

Work Type/Physical Demands

- *Sedentary work:* Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally, and all other sedentary criteria are met.

Working Environment

- *Everyday risk and discomfort level:* The environment involves everyday risks or discomforts that require normal safety precautions typical of such places as offices, meeting and training rooms, libraries, residences, or commercial vehicles, e.g., use of safe work practices with office equipment, avoidance of trips and falls, observance of fire regulations and traffic signals. The work area is adequately lighted, heated, and ventilated.

EEO Statement

Kirkwood School District is an Equal Opportunity Employer and does not discriminate on the basis of race, color, religion, national origin, age, disability, or sex, including pregnancy, sexual orientation, and gender identity and other characteristics protected by law.

Last Updated: May 12, 2024