

Exhibit A

Ontario-Montclair School District

CLASS SPECIFICATION Payroll and Benefits Coordinator

GENERAL PURPOSE

Under direction of the Chief Financial Officer, plans, organizes controls, integrates and directs the District's payroll and health and welfare benefits system and coordinates selected risk management and related duties. Perform responsible professional level duties including but not limited to the supervision of payroll staff, calculation and compilation of employee payroll and health and welfare benefits, interaction with position control system, processing and auditing of employee time records, and preparation of specialized reports to assure that district employees are paid in an accurate and timely manner; provide technical expertise, information and assistance to the Chief Financial Officer regarding assigned functions, development, and implementation of district policies, procedures, and programs; advise the Chief Financial Officer of unusual trends or problems and recommend appropriate corrective action; provide specialized support in the areas of risk management, including but not limited to worker's compensation analysis, fringe benefits coordination and analysis, actuarial study review, loss analysis, and regulatory compliance.

DISTINGUISHING CHARACTERISTICS

The Payroll and Benefits Coordinator plans, coordinates, evaluates and supervises the work of the Payroll support staff and, as needed, the Risk Management staff and other staff as assigned. Incumbents perform payroll, risk management, and other managerial work ranging in difficulty from moderate to the most complex and serve as resources to District managers and administrators. Assignments require the use of experienced professional judgment and a thorough knowledge of payroll, risk management, and fiscal principles.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class. There will typically be an assigned schedule for these duties.

1. Plan, organize and supervise assigned personnel performing clerical and technical payroll and fringe benefit work.
2. Provide technical expertise, solve a variety of payroll and fringe benefit problems and respond to questions or complaints from employees regarding interpretation of laws, rules and district regulations governing payrolls and fringe benefits.
3. Attend district and county office meetings and read pertinent information to keep current on payroll transactions and reporting requirements.
4. Work closely with Human Resources, Risk Management and Payroll to ensure that employees are paid correctly, charged to the proper accounts, and validation of records is completed between the Human Resource, Payroll , and Accounting departments.
5. Supervise the distribution of checks and payroll-related documents.
6. Supervise and participate in the review and verification of classified (CalPERS) and certificated (CalSTRS) retirement reporting.
7. Correspond with a variety of private firms; credit unions, banks, employees regarding payroll issues.
8. Prepare and/or coordinate completion of various payroll reports and filings, including pay histories.

9. Prepare and/or coordinate quarterly reports for State and Federal taxing agencies (payroll taxes, Medicare, OASDI).
10. Coordinate completion and distribution of Health Care tax forms, W-2 forms and other tax-related forms.
11. Ensure that payroll reporting and employee benefits information is compliant with the Affordable Care Act (ACA) and that the information is received and all ACA requirements are up to date and communicated to district employees.
12. Prepare notices and bulletins on changes to the payroll for site employees and payroll personnel.
13. Review issuance of payroll from the revolving cash fund.
14. Coordinate collection and reconciliation of fringe benefit accounts, including voluntary deductions (e.g. tax sheltered annuities).
15. Review methods and procedures for tracking sick time, vacation balances, and other payroll related leaves to ensure accuracy and that all laws and regulations are being followed.
16. Verify and/or calculate salary and fringe benefit increases or reductions.
17. Verify management, classified and certificated contracts for conformity to negotiated agreements and other established standards and requirements.
18. Write specifications for payroll-related transactions such as lump sum payments or retroactive pay.
19. Assist in planning, organizing and supervising assigned personnel performing certain clerical and technical risk management functions.
20. Assist in responding to inquiries from staff, the public and outside agencies regarding risk management policies and procedures.
21. Monitor budgets for a variety of programs such as Workers' Compensation, General Property and Liability, and excess insurance coverage.
22. Monitor all personnel request forms by verifying the action through position control.
23. Assist with the review and follow-up of student and staff injury and loss reports with a focus on prevention.
24. Assist with the preparation of various reports and summaries regarding Workers' Compensation, claims and litigation and performance of insurance programs.
25. Analyze loss data and trends to identify opportunities for improvement.
26. Maintain confidentiality of sensitive and privileged information.
27. Monitor new legislation affecting assigned activities.
28. Assure compliance with applicable laws, codes, rules and regulations.
29. Prepare and deliver oral presentations as requested.
30. Provide leadership and work with staff to create a high performance, service-oriented work environment that supports the department's mission.
31. Provide leadership and participate in programs and activities that promote workplace diversity and a positive employee relations environment.
32. Perform other related duties as assigned.

QUALIFICATIONS

Knowledge of:

1. Applicable sections of various tax codes.
2. Applicable sections of various retirement plans (PERS, STRS, etc.).
3. Applicable sections of the Education Code.
4. District bargaining unit contracts.
5. District statutory rates and fringe benefit plans.
6. Automated and manual personnel/payroll methods and systems.
7. District and County Office of Education payroll procedures.
8. District organization, operations and objectives.
9. Policies and procedures involved in the preparation, verification, maintenance and processing of district pay rolls.
10. Principles and practices of supervision and training.
11. Principles of financial record keeping.
12. Research methods, record-keeping and report-writing techniques.
13. Risk management and insurance laws, codes, rules and regulations.
14. Regulatory agencies governing risk management and insurance.
15. FMLA and district leave policies.
16. The Affordable Care Act Tax Provisions and employer reporting.
17. Correct English use, grammar, spelling, punctuation and vocabulary.

Ability to:

Establish and maintain effective working relationships with District management, staff, representatives of the County Office of Education, outside auditors and others encountered in the course of work.

1. Perform complex and technical payroll operations including payroll audits and reconciliations.
2. Communicate tactfully and effectively in contacts with employees, administrators, the public, and representatives of public agencies.
3. Select and use technology effectively and efficiently in support of payroll and office functions.
4. Evaluate and update payroll department practice and procedures.
5. Interpret, explain, and apply procedures and regulations pertaining to payroll procedures and policies.
6. Meet schedules and timelines.
7. Plan, organize, supervise, and evaluate the work of other.

8. Prepare reports obtaining data from more than one source or data base file.
9. Work confidentially with discretion.
10. Perform mathematical skills required to verify and balance accounts.
11. Learn and apply provisions of various government codes and manuals, as well as district fiscal policies and procedures.
12. Support and focus on the vision, mission, and goals of the organization and team.
13. Analyze situations accurately and adopt an effective course of action.
14. Solve problems in flexible, resourceful and creative ways.
15. Work within scope of authority.
16. Facilitate teamwork as well as helping others.
17. Resolve problems with tact and proficiency.
18. Establish and maintain effective working relationships with administrators, department heads, outside auditors and others.
19. Understand, be sensitive to, and respect the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disabilities and sexual orientation of teachers, administrators and staff.
20. Maintain consistent, punctual and regular attendance.
21. Develop and maintain effective interpersonal relations using tact, patience and courtesy.
22. Perform specialized technical support and administrative duties to the district in the areas of risk management.
23. Interpret, apply and explain applicable laws, codes, rules and regulations.
24. Maintain current knowledge of program rules, regulations, requirements and restrictions.
25. Read and interpret insurance rules and regulations regarding benefit coverage.
26. Learn district and State employee leave policies.
27. Prepare and maintain a variety of records, reports and files.
28. Prepare and deliver oral presentations.
29. Prioritize numerous tasks and complete them under various time constraints.
30. Complete work with many interruptions.
31. Effectively work in a demanding environment.
32. Perform duties with awareness of all district requirements and Board of Education policies.
33. Provide excellent customer service and promote a positive work environment.
34. Work collaboratively in a team environment.

Education, Training and Experience:

Graduation from a recognized four-year college or university with a major in business administration or a closely related field; and seven (7) years of progressively responsible payroll (including payroll preparation) experience, at least two (2) of which was in a lead or supervisory role, preferably in a school district or governmental agency. Risk management and/or other related experience is required. A master's degree in business administration or a closely related field may substitute for up to two (2) years of experience.

Licenses; Certificates; Special Requirements:

Certified Payroll Professional (CPP) and Risk Management certifications are desirable, but not required.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this class, an employee is regularly required to sit, talk or hear, in person, in meetings and by telephone; use hands to finger, handle, feel or operate computers and standard office equipment; and reach with hands and arms. The employee is frequently required to walk and stand, and lift up to 25 pounds.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, the employee is regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve problems; observe and interpret people and situations; use math and mathematical reasoning; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks with constant interruptions; work under intensive deadlines and interact with District management, staff and others encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions, and the noise level is usually quiet.

Board Approved: February 18, 2016