

## **TORRANCE UNIFIED SCHOOL DISTRICT**

### **CLASS TITLE: CATEGORICAL FUNDING SPECIALIST**

#### **BASIC FUNCTION:**

Under the direction of the Assistant Superintendent-Educational Services and Special Projects Resource Teacher, perform technical duties in support of the District's categorical funding programs; assure that Districts school site budgets are prepared appropriately and monitor the school site spending based on budgeted allocations; provide support to the non-public schools in preparing and monitoring their budgets and assist in ordering and disseminating materials for the non-public schools; compile and organize data and generate reports for State and Federal categorical programs.

#### **REPRESENTATIVE DUTIES:**

Perform responsible and technical duties related to the District's Categorical Funding Programs; assist the Assistant Superintendent-Educational Services and the Special Projects Resource Teacher in the coordination, preparation, distribution, monitoring of categorical budgets and reports mandated by the State and Federal government. *E*

Research and compile a variety of information; computation of statistical information for various District, school site, and non-public budgets; monitor the spending based on those budgets; and track the progress of the expenditures based on those budgets. *E*

Perform a variety of independent administrative duties including data collection, interpretation, and organization related to the preparation of the R-30 Report, the SNOR Report, and various Perkins Reports; send these reports to the appropriate State and Federal agencies; and monitor communications concerning these reports. *E*

Perform a variety of complex clerical and technical duties in support of Assistant Superintendent – Educational Services and the Special Projects Resource Teacher as related to Categorical Programs; District Communication Council, non-public schools, school site council training, schedule meetings, answer telephones, and duplicate materials. *E*

Coordinate the self-tutoring technology program (Pearson, "SuccessMaker") or other related technology program instituted to include billing, usage, training, and technical problems. *E*

Assist appropriate District staff with the Coordinated Compliance Review Process, categorical audits, and curriculum audits. *E*

Serve as liaison to visitors, administrators, staff, parents and the public; provide information or direct to them to the appropriate personnel; provide detailed and technical information concerning policies and procedures where judgment, knowledge and interpretation of procedures and regulations are required. *E*

Assure timely communications between Special Projects-Categorical Programs Office and District employees and non-public organizations; make phone calls to receive and transmit information; resolve problems as appropriate; refer difficult situations to supervisor. *E*

Create and format a variety of materials including inter-office communications, applications, requisitions, forms, letters, special projects reports, legal and compliance documents and other materials; establish and maintain project and confidential files. *E*

Take and transcribe dictation of correspondence, reports, bulletins, minutes and memoranda, including materials of a confidential nature as required by the position. *E*

Schedule and attend a variety of meetings; prepare and send out notices of meetings; maintain appointment calendar; collect and compile information for meetings, projects and workshops; prepare Board agenda items and related materials. *E*

Maintain a variety of complex personnel records, categorical salary and benefits, lists, files and records including confidential materials; administer payroll for department including completion and submission of time sheets as directed; assure confidentiality of information and records. *E*

Operate a computer work station to record information and generate lists, reports and other materials; utilize word processing and other software as required, including Desktop Publishing and Excel. *E*

Operate a variety of office equipment such as typewriter, calculator, dictation equipment and duplicating machines. *E*

Maintain accurate files on non-public school participation, including budgets, ordering, and follow-up reports. *E*

Perform annual inventory of all categorically funded equipment at site and district levels and maintain a record of designated work time allocated to each categorical program. *E*

Perform related duties as required.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

- State and Federal legislation as they pertain to categorical funding.
- Methods, practices and terminology used in budget formation.
- District organization, operations, policies and objectives.
- Modern office practices, procedures and equipment.
- Preparation of comprehensive categorical budgets and reports.
- Operation and use of computer workstation and peripheral equipment including word processing, Desktop publishing and Excel.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Record-keeping, report preparation, filing and proofing techniques.
- Oral and written communication skills.
- Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**

- Plan, organize, schedule and perform technical duties in support the District's categorical funding program.
- Assure that coordination, preparation, distribution, monitoring of categorical budgets and reports are prepared according to State and Federal mandates.
- Maintain effective working relationships with a wide variety of groups and individuals, including District administrators, employees, parents or members of the public.
- Compile and prepare data for mandated reporting requirements and special reports as needed.
- Work independently with minimal direction.
- Learn and interpret rules and regulations related to categorical funding programs.
- Analyze situations accurately and adopt an effective course of action.
- Maintain comprehensive files and records.
- Meet schedules and timelines.
- Work confidentially with discretion.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: bachelor's degree in business administration or related field supplemented by coursework in budgeting, accounting or related field and three years of professional school district statistical data experience involving database management.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Office environment; subject to constant interruptions from District personnel.

**PHYSICAL ABILITIES:**

Dexterity of hands and fingers to operate microcomputers and office equipment, sitting or standing for extended period of time, reaching to retrieve and maintain files, bending, pushing lifting, moving objects weighing up to 25 pounds, and hearing and speaking to exchange information.