

LEGAL DEPARTMENT ACCOUNTING COORDINATOR - CONFIDENTIAL

Definition:

Performs technical accounting, bookkeeping, and complex clerical work in support of the legal services fiscal operations. Studies, analyzes, plans, coordinates, and implements fiscal control procedures. Prepares and presents financial and statistical reports.

Distinguishing Characteristics:

The Legal Accounting Coordinator is distinguished from other accounting classifications in that the Legal Accounting Coordinator class requires in-depth knowledge of legal office accounting procedures. The classification also requires an in depth knowledge of school procedures, practices, and methods; and educational funding sources.

Supervision Exercised and Received:

Works under minimal supervision within a broad framework of policies and procedures and may direct the work of other clerical staff. Supervision is received from the General Counsel or designee.

Examples of Duties and Responsibilities:

Duties and responsibilities may include, but are not limited to, the following:

- Performs a variety of complex technical accounting, bookkeeping, and support functions for the Legal Department.
- May attend governance body and staff meetings to present, illustrate, and explain financial and statistical data, required reports, and budget information.
- Researches, compiles, assembles, and processes a variety of reports for accounting and fiscal operations. Reviews data for accuracy, consistency, and compliance with state and federal laws. Oversees and guides others in the preparation of reports, invoices and other financial records.
- Facilitates budgetary data gathering. Conducts research and assists in preparing numerous program budgets. Develops preliminary cost projections. Makes recommendations on the development of budget information and completes preparation of numerous budgets. Submits proposals to General Counsel or his/her designee for action.
- Processes and monitors expenditures, researches availability of funds, and prepares periodic performance reports for administration.
- Establishes and maintains a variety of computerized filing and information tracking systems for records, reports, manuals, logs, and chronological files. Ensures that files have backup and are complete.
- Verifies, posts, and processes a variety of accounts receivable, payable, equipment usage, and other charges in connection with business activity.
- Performs highly complex administrative support duties to include word processing, scheduling, handling calls and inquiries, and provides program and financial information to customers. Prepares original correspondence from notes, brief instructions, and drafts.
- Participate in development and implementation of internal and budgetary controls.
- Prepares annual and monthly reports and claims for reimbursement.
- Prepares monthly (and upon request) attorney time reports.
- Tracks and maintains office and attorney membership in industry groups and organizations, including the California Bar Association and Sonoma County Bar Association. Tracks membership information including membership renewal dates and electronic log-ins.
- Registers attorneys and support staff for trainings and conferences, and ensures payments for trainings and conferences are made pursuant to office and SCOE procedures.
- Regularly has access to and may gather confidential information relating to collective bargaining negotiations, grievances and other matters of employer-employee relations.
- Performs other duties as required to accomplish the objectives of the position.

Employment Standards:

Knowledge of:

- In-depth technical knowledge of generally accepted accounting standards and procedures.
- Working knowledge of the principles, practices, and techniques of financial and budgetary transactions as they apply to education funding, governmental accounting, special and alternative education.
- In-depth knowledge of automated accounting systems, relational databases, and related systems for entering, storing, retrieving, and processing accounting transactions.
- Operational knowledge of legal office methods, practices, and procedures including billable-hours concepts financial record keeping, word processing, and filing/tracking systems.
- Advanced math skills sufficient to compute sums, quotients, fractions, percentages, ratios, and trends.
- Command of English usage, spelling, grammar, and punctuation to prepare professional correspondence and standardized reports.
- Basic legal terminology.
- Sufficient human relations skill to communicate technical concepts to others and convey a positive, service-oriented image of the department.
- Safe work practices.

Ability to:

- Perform all of the relevant duties of the position with minimal supervision.
- Respond promptly to internal and external client requests for information, reports, training, assistance and special studies.
- Keyboard to perform data entry onto pre-formatted screens and to compose correspondence at a rate of 50 w.p.m.
- Understand and apply principles and practices of financial record keeping, including the practices related to a legal office setting.
- Operate a personal computer, printers, and specialized database software.
- Analyze technical or procedural problems and develop and apply appropriate solutions.
- Read, understand and apply information from contracts, and state, federal, and local laws and regulations.
- Write correspondence in a professional manner.
- Maintain confidential and sensitive information.
- Prioritize work in order to meet deadlines and maintain schedules.
- Work effectively as part of a team devoted to customer service.

Computer Skills:

- Internet usage including the ability to view web pages, use a search engine, bookmark a site, conduct research on specific topics.
- Advanced word processing skills, such as the ability to format sections, create multiple headers/footers; set tabs with leaders and indents; format text into columns and create and format tables and forms; insert watermarks, AutoShapes, and word art; create templates, and use merge functions.
- Advanced database skills, such as the ability to sort and retrieve records; create layouts and reports; create and print mailing labels; perform mail merge for form letters; add, edit, delete fields and records; and work with relational databases to create reports and lists.
- Highly advanced spread sheet skills, including the ability to insert formulas and mathematical calculations and work with functions; create workbooks and use multiple worksheets; format and print worksheets; sort lists; and create graphs and charts.

Education and Experience:

Any combination of education and experience that would likely provide the knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education:

- The position requires an Associates Degree in business administration or accounting.
- A bachelor's degree is preferred.

Experience:

- A history of progressively responsible experience in a production accounting environment with two years of involvement in budget or financial analysis.
- Financial record keeping and accounting experience may be substituted for formal education.
- One year of accounting experience in a legal office setting is preferred.

Physical Demands:

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.

- The position requires ordinary ambulatory ability to retrieve work materials, intermittent walking, standing, stooping, and carrying and lifting of light weight materials (under 20 pounds).
- Requires visual acuity sufficient to recognize people, words, and numbers.
- Requires hand-eye-arm and finger dexterity to use a personal computer keyboard, ten-key, and other common office equipment.
- Requires speaking and hearing ability sufficient to hear over phone and carry on routine conversations.
- Must have normal (20/20) vision, corrected or uncorrected.

Work Environment:

The following conditions may be present:

- Work is performed in an office environment with minimal exposure to health and safety considerations.

Other Requirements:

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by SCOE, prior to employment.
- TB testing will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- May be required to obtain first aid and CPR certificates within the first 6-12 months of employment.
- May be required to drive with or without students; some positions may require a current California driver license, proof of insurance, and possible participation in the DMV Pull Notice Program once employed.