

Revision Date: 07/01/2010



Job Description: Accounting Clerk

Job Title: Accounting Clerk I

Summary

Essential job functions and tasks are:

- Process UPS charges into Filemaker.
- Keep file of invoices entered into PO history and student counts current in database for schools.
- Collect checks from the district.
- Call district and ensure monthly funds will be available for pickup by the 15th of each month.
- Mark checks cashed from schools weekly.
- Research and credit past due invoices.
- Receives Vendor Statements
- Print vendor checks.
- Process PO requests per procedures.
- Process product invoices per procedures.
- Post vendor invoices to QB for payment.
- Post credits.
- Check encumber students in CP courses daily.
- Receive stamped checks.
- Post contract programs material and supply reimbursement charges.
- Contract program instructors to students listed on the CP roster.
- File the completed Invoice/Statement/Stub,\ Make new folders as necessary. for vendor files AP.
- Billing ISP Services



Accounting Clerk I - (Cont'd)

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Accounting Clerk

Job Title: Accounting Clerk II

Summary

Essential job functions and tasks are:

- Performs a variety of general accounting duties with additional responsibilities in payroll.
- Enter payroll personnel data into QBs; this includes miscellaneous deductions, garnishments, TSA benefits etc.
- Adjust funding, journal and CP entries for transferred (ES to ES) students.
- Adjust and ensure AESS charges are accurate.
- Process garnishments according to court order.
- Enter misc Insurance/501-3 into Quickbooks.
- Process school payroll checks.
- Prepare all checks for deposit into appropriate checking accounts, print paychecks and make direct deposits.
- Set up chart of accounts.
- Create invoices for charter schools for items paid for by IEM.
- Responsible for CalPERS monthly billing reconciliation.
- Review statements, post invoices to Quickbooks, financial income verifications and enter funding into database.
- Oversees vendor information in Quick Books accounting system. If vendor is not in bill pay, initiate 1099.
- Set up new hire hire for payroll and pay payroll liabilities.
- Receive monthly report from budgeting. Enter Administrative invoices for paymnet and ensure account codes for purchases are expended to the proper budget and entered into Quickbooks.
- Pre-research on statements over 90 days.
- Maintain files for charges made by Special Education Department.
- Ensure all requirements are met for each district to get reimbursed.
- Payment of Special Education SEATS bills.
- Receive ES to ES transfer notification.



Accounting Clerk II - (Cont'd)

- Backup support in matching vendor invoices with vendor checks for all schools.
- Receives Refund checks for service and products for all schools.
- Research all invoices with payment discrepancies prior to paying.
- Pay predetermined IEM invoices by credit card.
- Back up for payroll clerk.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Accounting Clerk II - (Cont'd)

skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Accounting Clerk

Job Title: Accounting Clerk III

Summary

Essential job functions and tasks are:

- Performs a variety of general accounting duties with additional responsibilities in reconciliation of billing and preparation of various reports.
- Monthly reconciliation of PacAdvantage, AFLAC, Delta Dental, VSP and ASH billing for IEM and school employees.
- Match and reconcile credit card receipts received.
- Reconcile payroll taxes for schools.
- Reconcile EDD payroll taxes received from QB payroll for school to payroll reports produced by QB.
- Reconcile monthly statements for benefit enrollments with current information.
- Upon balancing, prepare quarterly 941.
- Submit payroll quarterly reports for School.
- Reconcile payroll liability accounts in QB.
- Prepare 1099's and EDD quarterly contribution for schools.
- Run profit/loss balance sheets for credit increases.
- Monitor, maintain, file and process all contract program time sheets after payroll has processed payment.
- Receive refunds for all schools.
- Manage with correction and voiding privileges in quick books.
- Follow process to void checks returned.
- Banking statement/deposit is received and filed in a locked cabinet.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Accounting Clerk III - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Benefits Clerk

Job Title: Benefits Clerk I

Summary

Essential job functions and tasks are:

- Communicates and explains to employee's information related to a variety of benefits programs (ie: insurance plans, pensions, sick leave).
- Assists employees in completion of forms and provides general response to benefit inquires.
- Prepares communication to physicians, hospitals, and employees regarding claims.
- Process and enroll employees with benefits they have selected.
- Communicate with payroll of benefit issues.
- Research questions employees may have regarding benefits.
- Send open enrollment updates, process benefits enrollment for newly eligible employees and update insurance premium rates.
- Ensure processing of various employee forms (ie: pre-designation of doctor forms, CALSTRS-Permissive Membership (MR 350) forms, acknowledgement of application letters and salary reduction agreement form/request (403b).
- Notify employees of new CALPERS health benefit rates, Enter employee benefits and coding into QBs.
- Set up employee voluntary deductions in Quick Books.
- Review CTC notices; make changes to company process and requirements as necessary.
- Enter payroll information as requested.
- Prepare Cobra Info for employee's leaving. Review all documents for termination to be included to mail out. Mail overnight mail.
- Communicate to employees modifications to Medical Provider Network. Includes training staff to explain the changes and communicate to the carrier all documentation has been distributed.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Benefits Clerk I - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Benefits Clerk
Job Title: Benefits Clerk II

Summary

Essential job functions and tasks are:

- Prepares reports and statistical information regarding programs.
- May calculate benefits due and issue drafts for payments on self-administered or insured plans.
- Receive quotes from different insurance companies. Review, research and analyze medical benefit premiums and benefit policies for IEM employees. Make decisions on which to choose.
- Work with CALPERS representative to establish medical benefits for schools.
- Coordinate Medicare benefits (COB) IRS/SSA/CMS data match questionnaire.
- Work with CALPERS to obtain health benefits; obtain dental chiropractic, vision coverage for schools.
- Process the termination of benefits for existing employees following specific company guidelines.
- Communicate information with the benefit providers.
- Run school specific monthly reports for ES student count to determine benefit eligibility and notify employees of change.
- Adjust benefit caps according to the report and communicate changes to payroll.
- Reconcile monthly benefit statements.
- Research all new insurance information to be added to handouts during presentations.
- Input from REBEC as requested.
- Cobra Research Cal Chamber and contact Cal Pers, Blu Shield regarding Cobra enrollment.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Benefits Clerk II - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Budgeting

Job Title: Budgeting I

Summary

Essential job functions and tasks are:

- Compiles and reviews budgets for corporate or organizational units using actual performance previous budget figures, estimated revenue, expense reports and other data sources to control funds and provide for proper financial administration.
- Develop, maintain and publish budget reports for school and all sub programs using SACS coding.
- Set up chart of accounts.
- Generate copy of payroll snapshot for audit and payroll processing.
- Generate & publish Budget Report.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Budgeting I - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Budgeting

Job Title: Budgeting II

Summary

Essential job functions and tasks are:

- Prepares financial plans, monitors implementation of financial policies, prepares regular special purpose reports, maintains historical records, analyzes trends, establishes costs rates and personnel forecasts.
- Recommends and interprets budgetary policies and procedures, prepares comparative evaluation of actual costs against budgeted funds and determines rationale for variances between costs and budget.
- Submit school budget reports.
- Create monthly IEM cash flow analysis; create P&L and balance sheet for board (quarterly).
- Submit Budget report.
- Submit proposed budget and final school budget report.
- Submit school budget to parent council.
- Submit training budget proposal to Finance for individual IEM employees.
- Train, educate and oversee finance clerk to ensure understanding of purpose and quality of work.
- Track attendance and set hours.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Budgeting II - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: HR Generalist
Job Title: Human Resources Generalist I

Summary

Essential job functions and tasks are:

- Performs a variety of general Human Resource tasks in such areas as employee records, benefits, training, employment and equal employment opportunity.
- Address Human Resource/employment related type questions and or complaints for IEM and schools.
- Place ads for recruitment as requested by Directors and respond to inquiries.
- Create PO's for HR personnel budget.
- Create AT-Will agreements for all school employees.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment



Human Resources Generalist I - (Cont'd)

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: HR Generalist
Job Title: Human Resources Generalist II

Summary

Essential job functions and tasks are:

- Revise employee handbook as necessary for IEM and client Schools.
- Keep training and process updates and stay current on personnel/credentialing requirements; including review of updates from CCTC on changes.
- After notification of employee termination, follow specific procedures outlined in tension charts to ensure proper handling of employee.
- Process monthly report of new hires and forward to district.
- Research COBRA enrollment.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Human Resources Generalist II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: HR Generalist
Job Title: Human Resources Generalist III

Summary

Essential job functions and tasks are:

- Provides guidance to all levels of employees regarding personnel policies and procedures requiring some policy and procedure interpretation.
- Create and develop performance measurements for each IEM job.
- Work with GHG to solve time clock problems and create new reports.
- Check time clock entry and approve.
- Communicate with employees regarding calendar issues and absence reports.
- Ensure all appropriate employees have current job offer forms, check percentages and send to President.
- Research and review laws and procedures relating to the laws and processes pertaining to hiring employees.
- Manage the employee training/education pay variable process.
- Coordinate the claims for initiative and training for the employees.
- Analyze list of job duties and responsibilities.
- Learn and understand the criteria assigned and apply to matrix.
- Revise annual employee evaluation process.
- Evaluate staffing needs.
- Review and complete Peer Review Survey for HR Department.
- Research 403b, new IRS regulation requirements.
- Ensure students/families can drive to meet the ES.
- Research Domestic partner issues.
- Review changing COBRA laws.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Human Resources Generalist III - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Corporate Oversight

Job Title: Corporate Oversight

Summary

Essential job functions and tasks are:

- Act as IEM liaison to School Districts.
- Develop RFP's for company and works with outside companies to establish corporate objectives.
- Research and develop marketing strategies. Research possible office facilities.
- Identifies internal and external issues that could effect growth and profitability.
- Develop a harmonious working relationship with the Charter's sponsoring district office, the county office of Ed, and IEM.
- Attends District Board meetings, respond to Board questions.
- Attends non-training meetings at the State and government level.
- Report District news and requests to appropriate individuals.
- Meet with District Superintendant as needed.
- Provides reports to IEM Board.
- Meets with school directors as IEM representative to troubleshoot, negotiate and problem solve issues which may affect the relationship between schools and IEM.
- Research and review federal, state and county laws and guidelines which could affect IEM/Schools Schools (CDE, Labor, notifications from DOE etc.).
- Complete all nonprofit corporation annual requirements and State Dept.
- Compliance checklists for schools.
- Oversee schools/IEM audit.
- Attend charter school related meetings and conferences at the state and local levels (regulatory meetings, legislative hearings, conferences). Research and develop marketing strategies, RFP's.
- Research and contact districts arrange meetings for initial planning meeting and discussion on new charters.
- Prepare charter implementation plan which includes constructing charter documents and formal petition.
- Work to construct and complete all charter documents, MOU, formal petition and three-year operational plan and budget.



Corporate Oversight - (Cont'd)

- Obtain Charter numbers for New Schools.
- Obtain DOJ ORI numbers and accounts for New Schools.
- Identify the largest home school networks and organizations in all counties served and call to inform about new charters.
- Set up New School programs and co-ops.
- Research grants and funding support.
- Write agendas for school council meetings and insure that agendas are posted at school office sites, District offices and IEM 72 hours prior to meeting.
- Handle site admin/co-op issues and problems as they arise.
- Organize and facilitate meetings which encompass an operations coordinators groupings or cross operational meetings.
- Represents organizational unit on administrative matters.
- Recommends, interprets an/or implements company and internal administrative policies and procedures.
- Works to create and develop performance measurements for job functions Review and coordinate claims for initiative and education/ training for employees.
- Analysis and understand job functions and responsibilities and criteria to assign job functions based on matrix.
- Directs, administers and coordinates corporate activities in accordance with policies, goals and objectives established by the President.
- Assists in developing strategic short and long-range plans to cover operations, personnel, financial performance and growth.
- Finalizes financial reports for Board of Directors.
- Responsible for development of site map for IEM webpage.
- Improves, maintains, repairs professional relationships and operational needs of schools, districts, counties and IEM housed employees
- Acts as project leader on various projects.
- Supports the organizations' development which may include, but not limited to the following: employee development, process improvement, strategic planning.
- Work with IEM attorney to prepare for upcoming hearings.



Corporate Oversight - (Cont'd)

- Train personnel on administration issues including on-going administrative training on budget, cost center and object SACS coding.
- Work with schools on administrative staff negotiations.
- Attend Marcum-Illinois District Board meetings, supplies board w/enrollment report, budget cash flows and follows-up with research reports requested by members and/or superintendants 1-2 times per month.
- Coordinates with Special Education Consultants regarding the needs of the IEM and IEM school organizations. Compliance, customer satisfaction, parent and director complaints, staff needs, district or SELPA needs, Chelpe enrollment and budget are part of the scope.
- Follow through on school submission forms
- District liaison works with Education Directors, School Education Liaisons, sponsoring districts, school secretaries and vendors to coordinate and schedule graduation ceremonies.
- Facilitate the research/data reports as requested.
- Oversees all issues relating to theft of school owned materials. Obtains and investigates Police reports, contacts appropriate local law enforcement and involved parties. Communicates findings.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Corporate Oversight - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Personnel Clerk
Job Title: Personnel Clerk I

Summary

Essential job functions and tasks are:

- Compiles and sends employment packets to prospective employees.
- Manage the processing and recording of NCLB information for ES personnel files and the flow of the NCLB Certificate.
- Check and Review DOJ clearances daily.
- Send copy of benefit liabilities for schools to Benefits Coordinator.
- Maintain both manual and automated personnel records.
- Take receipt of employee applications.
- Review and process incoming applications per instructions; this will include research, analysis and follow through of applicant's information.
- Request employment packets be sent for contract program instructors.
- Insure employees have access to W-4 and DE-4 annually.
- Check references of selected employees.
- Assist perspective employees with the application process.
- Process chiropractic cards after received in Personnel.
- Perform Resource library functions for SS.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Personnel Clerk I - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/02010



Job Description: Personnel Clerk

Job Title: Personnel Clerk II

Summary

Essential job functions and tasks are:

- Take receipt of completed employee packets, and insure all necessary components have been included in the packet.
- Compiles data for reports.
- Ensure process of monthly new hire report and monthly TB Expiration Alert Report.
- Notify all affected departments and/or authorized persons and agencies within 48 hours of employee terminations.
- Aid payroll process through updating employee files with Certificated and STRS members.
- Prepare teacher roster for audit.
- Obtain DOJ ORI number and account for new schools.
- Send application to DOJ.
- Assist prospective vendors with the process to register their company with DOJ and the process for fingerprinting.
- Provide credential information to Auditors.
- Provide specific student data for California Department of Education Options office.
- Research and review archived CBEDS data to provide accurate information to the Department of Education Charter Schools.
- Submit DOJ application for account for schools to fingerprint and clear employees; prepare STRS and PERS roster and tape report for schools.
- Compile personnel information for CBED's Report.
- Run Credential Expiration Report.
- Process the ES's exit from system.
- Create a folder containing information for interviews



Personnel Clerk II - (Cont'd)

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Office Services Supervision

Job Title: Office Services Supervision I

Summary

Essential job functions and tasks are:

- Oversees central office service activities for optimum utilization of services and equipment including reception duties, duplication, records (filing), word processing, messenger service, supplies, mail services, telecommunications, telephone and fax services, and secretarial services and building security.
- Facilitates weekly Thursday office communication meeting through creating agenda, taking notes, setting up phone conference as needed and coordination of presentations.
- Provide consultation on printing orders.
- Research, compile and maintain accurate phone list. Provides employees with updated speed dial and extension lines.
- Prepares and facilitates monthly meetings for school employees who work in the IEM office.
- Inventory office supplies and order as needed.
- Complete arrangements to maintain and service office machines.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.



Office Services Supervision I - (Cont'd)

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Office Services Supervision

Job Title: Office Services Supervision II

Summary

Essential job functions and tasks are:

- Approves maintenance and alteration of office areas and equipment layout and housekeeping.
- Troubleshoot phone calls and supervise Receptionist schedule to ensure proper coverage.
- Responsible for phone answering machine.
- Ensure Pitney Bowes machine is capable.
- Communicate with Pitney Bowes in all areas of maintenance, questions, rate change, troubleshooting, bill, supplies and monthly reports.
- Works with staff, vendors, and landlord to ensure office is running in an efficient manner.
- Ensure all office communication is received in timely, accurate and professional manner.
- Resolve issues regarding acceptable office communication and work towards continual improvement.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Office Services Supervision II - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administrative Functional Support

Job Title: Administrative Functional Support I

Summary

Essential job functions and tasks are:

- Performs a variety of activities in support of functional areas such as finance, purchasing, human resources or specific project/business unit.
- Gathers, collects, records, tracks and verifies data and information from multiple sources.
- Track ES portfolios and document.
- Schedule appointment with prospective ES's.
- Maintain applications from prospective students, ensure they are complete prior to data input as well as the Civil Rights Survey and bluecards for backlog, process Cume files in and out, import report cards, school transcripts as needed per school, AESS forms and communication to schools and parents when needed.
- Process enrollments and drops, Education Verification Requests, identify and notify Special Education of applications.
- Clearing students from intake.
- Monitor late notices and student immunization information.
- Create and revise forms as needed.
- Enter HQT forms.
- Work with IT to solve problems and/or streamline processes.
- Meet with Accounting Area Coordinator to discuss/troubleshoot miscellaneous journal management, contract programs, special education and accounts payable problems.
- Post paid contract program timesheet and roll sheet changes to ES and student accounts.
- Monitor charges to accounts according to CP setup and agreement.
- Maintain an updated cross reference guide for AP.
- Enter credential information for all schools. Track and assist ES's teaching credentials for all ESs following the guidelines.
- Create student ID cards.
- SSID Identifier.
- Encumber New CP Students in database: enter and activate all AESS forms into database. Maintains an updated Cross reference guide for Accounts payable.



Administrative Functional Support I - (Cont'd)

- Get clear marketing picture for OG from SLVUSD, give feedback to OC.
- Administrative Support backup when lead Administrative Support person is unavailable, generate and circulate student enrollment applications.
- Develop and manage process to enhance work flow and efficiency in the collection and recording of all daily incoming student enrollment applications.
- Update in FRED when an employee has new tax forms, change of address, and change of name for Personnel.
- E-mail new ES's a welcoming e-mail with questionnaire and request for picture and biography.
- Print and file various ES, Advisor & staff evaluations.
- Copy and file completed certifications for VPSS trainings.
- Check the ALEKS system to verify the 11th & 12th grade students are using their CAHSEE prep licenses.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.



Administrative Functional Support I - (Cont'd)

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administrative Functional Support

Job Title: Administrative Functional Support II

Summary

Essential job functions and tasks are:

- Performs variety of activities in support of functional areas such as finance, purchasing, human resources or for a specific project/business unit.
- Provides data and information to others on functional unit processes and procedures.
- Manage the process for the Monthly sign in sheets.
- Print up the monthly agendas for each school.
- Address phone calls from ES's regarding students, transfers, drops etc.
- Handle all administrative issues involving prospective enrollment issues.
- Work with Kindergarten Survey for all schools.
- Attend to problem roll sheets. Alert for Contract Program timesheets/rollsheets.
- Ensure Truant drop specific letter is mailed to the district and manage the drop notification drop process.
- Prepare for P1, P2 and P3 report emails.
- Research and review various projects, issues, discrepancies as needed.
- Maintain CSIS updates and create CSIS report.
- Communicate to Education Directors about ESs and students for client schools; complete special projects.
- Research decision making, preparation for PAIF.
- Bi-annual research of existing Cume files.
- Daily adjustments to contract programs course roster as requested.
- Troubleshoot problems with CP/GEA and HQT/SME purchase orders, course encumbrances and course drops.
- Receive transfer notifications.
- Handle out of state/country transcripts.
- CSIS Anomaly resolution.
- Review CSIS and CDE reports – make corrections.
- Separate Process for out of state or out of country transcripts.



Administrative Functional Support II - (Cont'd)

- Enroll Report for SS.
- Post paid Contract Program timesheet/roll sheet charges to ES/student accounts. Research and resolve Contract Program time sheet discrepancies.
- Requests Drop Funding for Not Enrolling/Summer School Drops.
- Manage the yearly household information forms.
- Un-encumber student funds from an open Contract Program course.
- Research and review job titles.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Administrative Functional Support II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administrative Functional Support

Job Title: Administrative Functional Support III

Summary

Essential job functions and tasks are:

- Compiles reviews and analyzes data.
- Uses software for functional area to compile and generate reports, timelines, tables, graphs, correspondence and presentations.
- May design processes to enhance work flow.
- Manage entire processing of California school immunization records for each student.
- Complete Student National Origin Report (SNOR).
- Prepare a yearly Demographic County Enrollment form.
- Process monthly school detail reports, enrollment reports, semi-monthly reports for charter director and annual CHDP exam.
- Create yearly assessment reports for the State Health Department and gather CHDP information to prepare for the Annual School Report.
- Make summer school assignments and maintain appropriate forms and documentation.
- Prepare PERS final reports, track page 3 special education forms twice a year each semester.
- Audit & update Student Records for Foreign Born students attending public school within the most recent 3 years.
- End of year, transfer school years files by school, alphabetically. Label and arrange in preparation for audit.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Administrative Functional Support III - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Purchasing

Job Title: Purchasing

Summary

Essential job functions and tasks are:

- Purchases materials, services and supplies necessary for operation of schools and business.
- Maintain vendor file and ensure purchase order requests are processed.
- Communicate with accounting regarding new vendors.
- Resolve any vendor relations issues immediately.
- Maintain vendor file and update as needed.
- Enter all data in Filemaker on requested vendors; monitoring the progress of the vendor approval process.
- Communicate with accounting regarding changes.
- Order CELDT materials.
- Insure purchase order requests are processed.
- Arrange for purchase order material returns when necessary.
- Reviews proposal, negotiates prices, selects and recommends suppliers, analyzes trends, and maintains necessary records.
- Approve vendors using specific company processes.
- Maintain and update vendor agreements.
- Create all contract programs for budget purposes.
- Set up vendor presentations and coordinate request for vendor donations for charter open houses.
- Oversee the purchase and maintenance of school owned vehicles.
- Negotiate with fleet dealerships.
- Create vehicle Mileage log policies and log.
- Communicate vehicle guidelines to liaisons.
- Research penal, labor and education codes with IEM attorney to improve vendor agreement for IEM client schools and make appropriate revisions to vendor instructor policy. Communicate changes.
- Work with businesses to create more effective tracking systems.



Purchasing - (Cont'd)

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: CEO

Job Title: CEO

Summary

Essential job functions and tasks are:

- Responsible for the operations of the firm; report to a board of directors; may appoint other managers.
- Create bonus pay matrix using mathematical equation that objectively determines bonus pay for all employees.
- Determine where each employee fits on the pay analysis grid.
- Attend miscellaneous meetings.
- Meet with Project team.
- Assist all employees with specific concerns.
- Answer all emails directed toward CEO.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



CEO - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Corporate Facilities Management

Job Title: Corporate Facilities Management

Summary

Essential job functions and tasks are:

- Responsibilities include ordering cell phones, phone maintenance and monitoring IEM and schools.
- Monitoring SBC Cal Net contract for reduced rates for certain IT services.
- Compile list of leased/rented items for all facilities for President.
- Negotiates rent increases/lease options and resolves issues with landlord.
- Is responsible for DSL concerns and manages copier leases and maintenance.
- Coordinates donated materials; transports items from storage to new school sites as needed.
- Coordinates the locks to be re-keyed by the locksmith.
- Facilitate repairs and maintenance of property as required.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 25 lbs.



Corporate Facilities Management - (Cont'd)

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Controller
Job Title: Controller Division

Summary

Essential job functions and tasks are:

- The principal financial adviser to a division of the company.
- Provides financial planning and control services through a professional staff, including analyzing financial results, applying accepted accounting methods, controlling to budgets and generating reports on sales, manufacturing costs, profits, etc.
- File 941 quarterlies for IEM, File EDD quarterly DE 6 and Annual DE 7 for IEM, File 990 IRS annually.
- File Business Property statement for IEM.
- Submit IRS 199 for intended year..
- Reconcile vendor bank statement to the general ledger.
- Maintain control of signature stamp and approve all outgoing checks for all schools.
- Ensure proper funds are in each checking account.
- Prepare invoices for all schools to proper district to recoup special education funds.
- Ensure all accounts receivables are monitored and received as soon as possible, all accounts payables are paid on time, all payroll is complete, accurate and on time, all finance reports are accurate, complete and on time.
- Get list of rental equipment for re-imbusement purposes.
- Complete 5 year financial plan.
- Report to board monthly.
- Oversight of special education funds.
- Take vendor calls and emails when Accounting Coordinator can not resolve the issue.
- Responsible (along with OC team) for oversight of IEm school budgets, approvals, moving funds, line item approvals, evaluation of cash flow and securing loans as needed.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Controller Division - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administration Generalist

Job Title: Administration Generalist I

Summary

Essential job functions and tasks are:

- Performs as a generalist a combination of administrative tasks in such areas as Finance, Human Resources, Purchasing and or other business unit.
- Coordinate the printing and mailing of various school mailings.
- Complete monthly attendance report for all schools. Maintain spreadsheet showing enrollment and drop date corrections.
- Complete special projects.
- Address parent support phone call.
- Manage ongoing email/phone communication with school director and assessment director.
- Maintain Student Activations.
- Communicate to Auditor the process of locating attendance for a student.
- Assist with monthly attendance reports.
- Research and catalog parent resources.
- Compile STAR binder for coordinator folders.
- PDS help-line & web mail for the purpose of assisting parents/others with various obstacles in the education system.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Administration Generalist I - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administration Generalist

Job Title: Administrative Generalist II

Summary

Essential job functions and tasks are:

- May prepare budgeting, project scheduling and statistical reports as required.
- Research and update regulation and assessment communications.
- Keep current on CDE, Federal regulations for all assessments, test publishers policy/process/information.
- Review contract programs class and set up for completeness.
- Insure group educational activities has all necessary documents prior to GEA.
- Track expenditures and timesheets.
- Create monthly newsletters.
- Monthly reporting requirements.
- Coordinate Physical Fitness Testing.
- Serve on various task force.
- Create and track ES assessment work schedule.
- Address any problems or questions regarding CP's or GEA's.
- Participate in planning meetings with school Assessment Director.
- Review and provide input on President's book sales and speaking engagements.
- Post specific student STAR test site information letter (grades 2-11).
- Email ES of student with identical STAR test site information.
- Match vendor invoices to check stub.
- Service vendor invoices and ensure they are being paid timely.
- Create and send notice to service vendor to notify them of late date for invoicing for this fiscal year.
- Address questions regarding school charter and it's benefits to prospective parents.
- Audit contract program/timesheets for mathematical errors.
- Verify contract number in FileMaker Pro.
- Service Invoices for SMCS, SSCS.
- Fax PO and ordering ESs to Houghton Mifflin.



Administrative Generalist II - (Cont'd)

- Complete on-line class vendor approval.
- Problem solve with Directors, Advisors and ESs regarding problem student agreements or difficulties with testing.
- Research all STRS District Contacts.
- AF compilation.
- CASHEE testing – receive tests, mail to proctors, print & mail out parent letters & test scores.
- Provide ETS with CASHEE coordinator information.
- Train SGI on contract and timesheets.
- Manage STAR charts for accuracy.
- Check PO inquiry emails daily to resolve problems for ES's/work with vendors.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Administrative Generalist II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administration Generalist

Job Title: Administration Generalist III

Summary

Essential job functions and tasks are:

- Represents organizational unit on administrative matters.
- Recommends, interprets and or implements company and internal administrative policies and procedures.
- Coordinate Standardized Testing and Reporting Program.
- WRAT-Plan and coordinate wide range assessment test.
- Process P1, P2, P3 and revised P2 report.
- Prepare STRS, PERS final reports (118).
- Create quarterly assessment reports for Parent Council, monthly expiration report, CalPers monthly billing reconciliation and direct funding attendance report.
- Update contract programs on the web, Produce monthly attendance Pro Reports.
- Process monthly detail reports.
- Ensure CBEDS report is completed.
- Coordinate California High School Exit Exam –CAHSEE.
- Work with staff as needed to ensure School and IEM audit is complete.
- Gather confidential student record information and create report(s).
- Create Excel spreadsheet ammended to reflect scantron changes, exporting spreadsheet to Filemaker and updating testing information and gathering writing samples.
- Compile the samples to see if the student’s scores are entered into the database; check off the ES if complete and mail them with done or problems.
- Provide HR with dates of IEM involvment with all previous and current Charter Schools. Create work sheet with all pertinent information found.
- Research from approved a-g text book and course syllabus to create study guides.
- Track data from FRED on spreadsheet on WASC and charter renewal curriculum information.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Administration Generalist III - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Administration Generalist

Job Title: Administration Generalist IV

Summary

Essential job functions and tasks are:

- Calls and facilitates meeting for their area.
- Meets with Marcum District Superintendent regularly.
- Coordinates and helps prioritize work flow in their area
- Administers bi-annual tension chart review to insure tension charts are current and up to date.
- Reviews employee timesheets.
- Works with area employees to problem solve in that area.
- Brings issues to OC when necessary.
- Does research required to get over all departmentally required answers. Attend Marcum-Illinois District Board Meetings.
- Supply Board with enrollment report, budget cash flows and follow up with research reports requested by members once or twice per month.
- Share feedback with school administrators or OC.
- Set up and help coordinate events that take place at the facility, STAR testing, ES meetings, SS.
- Set up Costco and Staples accounts for employees.
- Complete and submit credit application to vendors per their request.
- Complete online Chevron Business card applications for company owned fuel purchases.
- Review efficiency of graduation and other events.
- Expedite communication between ES and parents.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Administration Generalist IV - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Data Entry/File Clerk

Job Title: Data Entry/File Clerk

Summary

Essential job functions and tasks are:

- Enter data for new employees.
- Enter parent address/phone changes in to database.
- Enter ES/School evaluation/survey data, WRAT information, immunization information, CASHEE and CELDT test scores and EAP requests as received.
- Run prospective student auto email program every 2 weeks.
- Enter student preferences and zip codes per ES request.
- Enter prospective student from application.
- Organize the faxed applications for each student.
- Fax transcripts to schools and parents.
- Enter payroll information as requested.
- Interprets information from a variety of source documents to determine data to be keyed.
- Maintains missing materials forms in database.
- Enter Roll Sheets in to database.
- Create files for frequently used vendors for new school year.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Data Entry/File Clerk - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Information Systems

Job Title: Information Systems I

Summary

Essential job functions and tasks are:

- Maintain ES and list Serve..
- Set up ISP accounts and post changes.
- Update and maintain the Yahoo parent list serve.
- Download Microsoft Service pack updates for the PC's.
- Update files, servers and clients to new version of Filemaker.
- Update software.
- Manage and serve systems consisting of the network of all communication channels used within an organization.
- Process payroll snapshot each month.
- Update contract programs on the web.
- Reconnect staff to Citrix and evaluate database problems.
- Negotiate with School Directors when generic web forms need to be changed.
- Generate tri-annual reports (P1, P2, P3) and revised P2.
- Review all subcharts for additional subcharts. Reassign/archive if necessary.
- Copy all files that are in current use from the recent DATA1 and DATA4 backups to a single folder on the Inspector machine.
- FRED recovery and restoration.
- Obtain enrollment date information for all students through CALPADS.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Information Systems I - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Information Systems

Job Title: Information Systems II

Summary

Essential job functions and tasks are:

- Manage and serve systems consisting of the network of all communication channels used within the organization.
- Program computers at all locations.
- Generate tri-annual reports (P1, P2, P3) and revised P2.
- Track age of servers and user computers; replace as needed.
- Collaborate with Director on projects.
- Develop new database software.
- Create new data files.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Information Systems II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Insurance/Risk Management

Job Title: Insurance/Risk Management I

Summary

Essential job functions and tasks are:

- Coordinates and assist with risk control programs to prevent losses and reduce premiums.
- Insures Vendor insurance is adequate and has not expired for high risk courses.
- Follows up with vendors to ensure that insurance is up to date and that Red Cross certificates are current.
- Submits claims and monitors payments.
- Participates in appraisal and adjustment proceedings.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment



Insurance/Risk Management I - (Cont'd)

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Insurance/Risk Management

Job Title: Insurance/Risk Management II

Summary

Essential job functions and tasks are:

- Develops, implements and administers company casualty and property-loss insurance programs.
- Analyzes and defines potential loss areas and determines appropriate type and level of loss protection to be insured.
- Oversees records retention and manages insurance policies.
- Prepares specifications for broker or underwriter bids, evaluates bids and recommends or concludes insurance contracts.
- Develops and coordinates risk control programs to prevent losses and reduce premiums.
- Manage special school umbrella insurance policy.
- Research & evaluate different insurance companies to get the best possible coverage, pricing and superior customer service.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Insurance/Risk Management II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Occupational Safety and Health

Job Title: Occupational Safety and Health I

Summary

Essential job functions and tasks are:

- Responsible for identifying hazardous workplace conditions.
- Investigates, prepares and forwards required reports on injuries and fatalities.
- Creates safe work procedures and training courses.
- Work with maintenance and administration to ensure a safe environment at all school sites.
- Complete the annual Survey of Occupational Injuries and Illnesses through the U.S. Department of Labor Statistics.
- Respond to employees worker compensation claims for insurance comp carrier.
- Arrange ergonomic evaluations with Workers Compensation Carrier in office locations as needed.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Occupational Safety and Health I - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____



Job Description: Occupational Safety and Health

Job Title: Occupational Safety and Health II

Summary

Essential job functions and tasks are:

- Oversees OSHA compliance.
- Identifies hazardous workplace conditions and takes preliminary samples and measurements of hazardous forces and toxic substances.
- Removes hazards and or protects employees by guarding, revising work procedures and training or requiring use of protective clothing and personal protective equipment.
- Takes effective steps to ensure that workplace conditions comply with applicable federal and state occupational safety and health standard provisions of any labor agreement, ensuring that all required records are prepared and maintained.
- Participates in Occupational Safety and health Administration inspections and in any procedures that may follow a citation.
- Handles workers compensation claims.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Occupational Safety and Health II - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____



Job Description: Validation Analysis

Job Title: Validation Analysis

Summary

Essential job functions and tasks are:

- Assists with various tasks associated with the implementation of strategic planning.
- Investigates and troubleshoots validation problems for performance processes.
- Performs operations necessary to develop and or evaluate process quality and system standards to ensure compliance with company standards and or government regulatory requirements.
- Manage assessment data.
- Conducts statistical analyses of testing results and process anomalies; writes documentation for new and current validation procedures and technical reports.
- Implementation of strategic planning.
- Assist with the development and implementation of on line student enrollment applications giving input and participate in the beta testing group.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Validation Analysis - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Training

Job Title: Training I

Summary

Essential job functions and tasks are:

- Implements and operates in-house programs, practices, and procedures for training purposes.
- Coordinates class arrangements and inputs test data.
- Give district designee student records access and training to view electronic student records.
- Assist in preparation and execution of training material and classes as requested.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment



Training I - (Cont'd)

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Training

Job Title: Training II

Summary

Essential job functions and tasks are:

- Designs in-house programs to train all levels of personnel.
- Develops and prepares tests and visual aids.
- Develop and implement audiovisual training program for assessment positions, ES test administration, CELDT, coordinators, cscs and clerks.
- Trains and communicates with staff to improve efficiency regarding use of tension charts.
- Participate in post assessment meetings for evaluation of program.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment



Training II - (Cont'd)

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Training

Job Title: Training III

Summary

Essential job functions and tasks are:

- Keeps abreast of training and development research.
- May use and oversee contractors or vendors to enhance in-house capabilities.
- Conduct database training every 3rd week.
- Training staff on student records tasks and supervising work.
- Responsible for the success of each training class and materials produced.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment



Training III - (Cont'd)

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Secretary

Job Title: Secretary I

Summary

Essential job functions and tasks are:

- Collect, send, open and distribute mail.
- Responsible for mailing of training CD's, PERS, STRS and Buy in payments and documentation.
- Distribute faxes.
- Complete projects as requested.; arrange meetings and conferences.
- Communicates regularly with Learning Center clerks, STAR CASHEE, and PFT coordinator.
- Oversee and organize the Resource Center; check materials in and out, including the organization of the Resource Center.
- Perform Resource Library functions for client schools.
- Manage parent surveys for school year.
- Mail appropriate assignment postcards each week, late notices and CHDP information.
- Responsible for viewing all AP email on a daily basis:
 - Picks up Accounting mail daily.
 - Go to the post office to collect and send mail.
 - Open all finance mail, sort and date stamp.
 - Take checks from bi-monthly check run to post through postage meter and mail.
 - Mail vendor checks with any remittance and deposit check for special education.
 - Address routine emails, phone, and fax as needed.
 - Schedule appointment with prospective ES's.
 - Attend Board meeting and take attendance.
 - Make last minute calls to ensure a quorum.
 - Schedule interviews.
 - Take deposit to bank for IEM and all schools.
 - Back up to PO's after processing.
 - Shred all Po's after confirmation they were faxed successfully.



Secretary I - (Cont'd)

- Secretarial duties for graduation include diplomas, honor certificates, announcements and obtaining guest counts.
- Post monthly blog.
- Create a directory with addresses and phone numbers of grad students for use in Grad Survey.
- Order all supplies needed for STAR testing sites.
- Provide copies of parent Driven Schools to all incoming active parents.
- Mail and ship books.
- Arrange, prepare and set up employee BBQs.
- Conduct new parent phone survey and enter into FRED.
- Order materials in spring for ES meeting. Email presenters, compile list & place order.
- Set up rooms for all ES meetings, organize lunch & assist in clean up.
- Type surveys created by the curriculum coordinator.
- Gather documents from presenters and copy. Compile, assemble and distribute packets at the meeting.
- Communicate with and track employee absences. Send a confirmation request to employees and maintain a file of each.
- Send out the ON HOLD postcards to applicants that have been interviewed.
- Organize parent volunteer groups.
- Participate in the planning meeting with Education liaison regarding grad ceremony needs.
- Confirm facility use and equipment for ceremony and reception.
- Miscellaneous special projects for administration.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Secretary I - (Cont'd)

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Secretary

Job Title: Secretary II

Summary

Essential job functions and tasks are:

- Serve as secretary of IEM Board of directors; create Board packets, post and distribute.
- Compose correspondence for Co-director, schedule appointments, meetings, travel arrangements and development of contract information.
- Write OC/Special Education meeting outline.
- Get clear marketing picture for OG from SLVUSD, give feedback to OC.
- Attend school meetings; participate, take notes, create and send agendas, set schedule, and communicate with participants.
- Act as Custodian of Corporation records and corporate seal.
- Certifies amendments to bylaws and resolutions by signing them and affixing seal.
- Creates chairman of the board evaluation.
- Make reservations for car, hotel, and flights for conferences.
- Obtain ES recommendation for prospective board members appointed.
- Email agenda and all pertinent information to board one week prior to meeting.
- Create spreadsheet of board members and term lengths, maintain records.
- Suggest board appointments to Director based on criteria.
- Send letters via email and mail regarding board appointment to new member.
- Type and post board meeting notes on site upon approval from Directors.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Secretary II - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____

Revision Date: 07/01/2010



Job Description: Strategic Planning

Job Title: Strategic Planning

Summary

Essential job functions and tasks are:

- Plan and implement strategies for successful assessment coordination and participation.
- Develop and participate in various Project Team programs that are designed to facilitate the ultimate achievement of IEM's goal.
- Continually create and evaluate new policy and procedures.
- Develop an approval and implementation process for all Project Team Proposals.
- Ensure Charter School has an annual independent fiscal audit done of the entire charter school operation in accordance with all applicable laws.
- Confirm directors have read and understand the fiscal controls.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment



Strategic Planning - (Cont'd)

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____



Customer Service Clerk - (Cont'd)

Revision Date: 07/01/2010

Job Description: Customer Service Clerk

Job Title: Customer Service Clerk

Summary

Essential job functions and tasks are:

- Establish and maintain a good working relationship with vendors, parents, students, ES's, Directors staff and other customers.
- Address and work toward resolution of questions and concerns.
- This may include phone calls/emails from ES's regarding students, transfers, drops, the status of PO's, status of vendor approval etc.
- Responding to and answering vendor phone calls/emails regarding canceled/back ordered items, price changes, product substitutions or basic payment questions etc.
- Works with vendors to follow up on orders, verify deliveries and arrange for returns.
- Handle Incorrectly Delivered Packages
- Work with UPS to arrange pick-up and return of merchandise to vendors.
- Track the number of computers the school has that are used for instruction related purposes and how many classes have access to the internet.
- Complete and submit a credit application to vendors as per their request. Re-route invoices received in Lincoln office to accounting.
- Send welcome letters to all approved vendors.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers



Customer Service Clerk - (Cont'd)

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____



Revision Date: 07/01/09

Job Description: Accounting Coordinator

Job Title: Accounting Coordinator

Summary

Essential job functions and tasks are:

- Oversees all contract programs for budget purpose.
- Monitors and spot checks data entry to CP FRED is correct.
- Work with IT to develop FRED & archive old files.
- Views, approves and spot checks monthly timesheets for CP.
- Process main batch of vendor checks for all schools.
- Oversees all payment of invoices.
- Requires special password privileges.
- Sets internal controls and monitors them.
- Ensure proper procedure for printing and handling of checks.
- Approves time clock for AR/AP area employees.
- Manage s attendance of account clerks.
- Consults with Auditors on any issues that arise in the area of accounting.
- Responsible for the close out of the fiscal years.
- Facilitates the research, data, reports requested by school districts.
- Facilitates compliance list queries when requested.
- Develop in house accounting manual.
- Improve cross training of accounting employees.
- Outline audit compliance for staff.
- Serve as AP/AR and journal management.
- Interface with the Director of Beyond Point B in accounting matters.
- Report to Board and CFO.
- Maintains the records of the financial audits.
- Reviews content of out going email from accounting staff when involved in sensitive issues.



Revision Date: 07/01/09

Job Description: Accounting Coordinator

Job Title: Accounting Coordinator

- Problem solve with area employees when needed.
- Responds to any and all site administration issues.
- Require additional temporary employees if needed.
- Directs end of year close out of PO's.
- Evaluate current policy and procedures to determine if it is being implemented as intended, revise as necessary.
- Continually look for new ways to improve department.
- Responsible for recognition of individuals in accounting department.
- Stamp all checks with signature stamp for all check runs for all schools.
- Maintain vendor information in Quick Books for IRS purposes.
- Follows through with misc. task per CFO request.
- Plans, schedules and directs the work of the accounts payable/accounting unit for IEM and client schools with in the guidelines set forth by IEM.
- Develop in house accounting manual with P/P.
- Develops, Implements and recommends policy and procedure to manage the A/P, A/R and accounting area of IEM and the Client schools.
- All schools first point of contact for problem invoices or statements. Give direction and resolve.
- Manage with correction and voiding privileges in quick books.
- Oversight for inner school billing services provided by sister schools and districts for outstanding invoices. Prints monthly statements for each school.
- Responsible for oversight of statement process. View, direct work, gives advice; follow up with area employees on various problem statements.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.



Revision Date: 07/01/09

Job Description: Accounting Coordinator

Job Title: Accounting Coordinator

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 10 lbs.

Typical Working Conditions:

General office environment

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

Disclaimer

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Employee Acceptance _____ Date _____



I.

Revision Date: 07/01/2010

Job Description: Maintenance

Job Title: Maintenance

Summary

Essential job functions and tasks are:

- Perform diversified duties to ensure the proper maintenance of equipment and property.
- Comply with safety regulations and maintain clean and orderly work areas.
- Transport items as requested, i.e. moving items from storage to new school sites.
- Trash removal, moving furniture and replace or repair parts.
- Use of various hand tools in performing duties.
- Ensure all buildings used for trainings and other special events are secured when done.

Education and Experience:

- College degree preferred, but not required.
- Some office experience preferred, but not required.

Skills Used:

- Typing
- Data entry
- Computers

Physical Requirements:

- Sitting in a normal seated position for extended periods of time.
- Reaching by extending hand(s) or arm(s) in any direction.
- Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard.
- Communication skills using the spoken word.
- Ability to lift up to 25 lbs.

Typical Working Conditions:

General office environment



I.

Equipment Used:

Computer, phone, calculator, copiers, printers and miscellaneous office equipment

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Employee Acceptance _____ Date _____