



Coachella Valley Public Cemetery District Classification Specification

FINANCE SPECIALIST

May 2025

FLSA Status: Non-Exempt

Range: 39

Hourly: \$34.48 to \$41.92

Monthly: \$5,977.00 to \$7,265.00

Yearly: \$71,728.00 to \$87,185.00

DEFINITION:

Under the direction of the Finance Manager/Clerk of the Board, supports a broad range of administrative and financial operations for the District. Key areas of responsibility include payroll, accounts payable and receivable, budgeting, cash and expense management, tax reporting (including payroll and sales taxes), internal audits, and fixed asset accounting.

ESSENTIAL DUTIES:

- Process payroll and manage employee benefits and workers' compensation, ensuring accurate documentation of wages, deductions, and related records.
- Prepare and issue accounts receivable invoices in accordance with contract terms.
- Review and verify purchase orders and track expenditures.
- Receive and process customer payments; reconcile accounts receivable with CemSites monthly.
- Review and process trustee and employee reimbursement requests with appropriate documentation.
- Record, categorize, and reconcile credit card transactions.
- Receive, review, and enter vendor bills with accurate job costing; ensure timely payments.
- Reconcile monthly bank statements and maintain accurate cash balances.
- Assist in preparing the District's annual budget and support long-range financial planning.
- Prepare and submit biweekly payroll tax filings and quarterly payroll tax reports.
- Prepare and submit quarterly sales tax reports.
- Support the annual audit process and assist in reviewing the Annual Comprehensive Financial Report (ACFR).

- Prepare monthly financial and investment reports for Board meetings and generate other reports as needed.
- Maintain financial records in accordance with the District's Records Retention Policy.
- Perform administrative tasks including:
 - Filing of vendor and customer payment records
 - Document organization and general recordkeeping
 - Supporting compliance with retention schedules
 - Other administrative duties as assigned
- Monitor compliance with applicable financial regulations, procedures, and internal controls.
- Provide assistance with fixed asset tracking and related accounting.

OTHER DUTIES:

- Performs related duties as assigned.

QUALIFICATIONS:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

Associate degree in Accounting, Bookkeeping, Business, or a closely related field preferred.

Experience:

Five (5) years of progressively responsible experience in accounting or finance,
OR

Two (2) years of experience in a finance or accounting role within a California Special District or other public agency.

Licenses, Certifications and other Requirements:

- None

Knowledge of:

- Finance, bookkeeping, QuickBooks, payroll processing, financial accounting principles.
- Sound administrative processes.
- District business operation.
- Public agency financial practices, including general/governmental accounting, fund accounting, payroll, internal controls, and auditing.
- Reporting and budgeting processes in a public sector environment.
- GAAP (Generally Accepted Accounting Principles) and GASB (Governmental Accounting Standards Board) guidelines.
- Administrative skills to include use of computer, applications, software and office equipment.

- Customer Relationship Management (CRM) systems.
- Written, verbal communication skills.
- Spelling, grammar, and practices of proofreading.

Ability to:

- Accurately process and record accounting transactions and payroll.
- Researching and reconciling discrepancies in transactions and between record keeping systems.
- Strong time management and organizational skills with the ability to manage multiple priorities.
- Critical thinking and problem-solving abilities with attention to accuracy.
- Ability to document procedures and improve workflows.
- Effective verbal and written communication.
- Ability to work independently with minimal supervision while maintaining accountability.
- Discretion in handling confidential and sensitive financial data.
- Ability to communicate effectively with internal staff, Trustees, vendors, and customers.
- Must possess strong interpersonal and customer service skills to effectively assist families, vendors, and the general public with sensitivity and professionalism.
- Using Microsoft Excel and Word.
- Learn new software applications as needed.
- Operate a computer and related software.

WORKING CONDITIONS:

Work Environment:

- Standard indoor office setting, with the use of standard office equipment, including a computer with normal levels of noise characteristic of an office.

Physical Demands:

- Ability to read materials both in print and on a computer screen.
- Ability to communicate with coworkers and members of the public both in person and over the telephone.
- Standing in work areas.
- Walking between work areas and District grounds.
- Ability to access, enter, and retrieve data using a computer keyboard or calculator and operate standard office equipment.
- Bend, stoop, kneel, reach, push, and pull drawers to retrieve and file information.
- Ability to lift, carry, push, and pull materials and objects up to 10 pounds.