

**MANAGER, BURSAR'S OFFICE**

**DEFINITION**

Under general direction, plans, organizes, oversees, coordinates, and reviews the work of staff performing professional, technical, and administrative support related to the processing of the District's Bursar's Office, including preparing and reconciling student accounts receivable, refunds, fees, collections, and student accounts; provides complex and responsible support to the Associate Vice President, Fiscal Services in areas of expertise.

**SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from the Associate Vice President, Fiscal Services. Exercises direct and general supervision over technical and administrative support staff.

***CLASS CHARACTERISTICS***

This is a management classification that manages District-wide student accounts receivables in the Bursar's Office. The incumbent organizes and oversees day-to-day processing, reporting, and record-keeping activities and required reporting in accordance with Federal, State, and local laws, rules, and regulations. The incumbent organizes and oversees day-to-day activities and is responsible for providing professional-level support to the Associate Vice President, Fiscal Services in a variety of areas. Successful performance of the work requires an extensive professional background as well as skill in coordinating departmental work with other departments and divisions. This class is distinguished from the Associate Vice President, Fiscal Services in that the latter is a senior-level department head classification with responsibility for directing and overseeing all functions of the Fiscal Services department as well as developing, implementing, and interpreting public policy.

**EXAMPLES OF ESSENTIAL JOB FUNCTIONS** (Illustrative Only)

- Plans, manages, and oversees the daily functions, operations, and activities of the Bursar's Office, including preparing, securing, monitoring, reconciling, and analyzing all District collections such as registration fees, tuition, parking permit fees, parking citation fees, and miscellaneous fees.
- Participates in the development and implementation of goals, objectives, policies, and priorities for the Bursar's Office; recommends within departmental policy, appropriate service and staffing levels; recommends and administers policies and procedures.
- Participates in the development, administration, and oversight of the assigned budget.
- Develops and standardizes procedures and methods to improve and continuously monitor the efficiency and effectiveness of assigned programs, service delivery methods, and procedures; assesses and monitors workload, administrative and support systems, and internal reporting relationships; identifies opportunities for improvement and makes recommendations to the Associate Vice President, Fiscal Services.
- Participates in the selection of, trains, motivates and evaluates assigned personnel; works with employees on performance issues; recommends discipline to the Associate Vice President, Fiscal Services.
- Oversees collections and refunds of student accounts; creates automated processes that generate student refunds; responds to student and parent questions regarding their accounts and fees; ensures student accounts are all balanced; assists students with related questions on the phone and in person; oversees processing of student and staff photo ID's.
- Manages communication within the Bursar's Office to ensure smooth and efficient accounts receivable activities, streamline processes, and prevent duplication of efforts.

- Monitors changes in regulations and technology that may affect assigned functions and operations; implements policy and procedural changes after approval; runs technology upgrades in a testing environment to ensure automated procedures work properly within the accounting system.
- Responsible for student accounts receivable module within the enterprise application financial system; ensures accuracy and timeliness of information contained on the District's web portal.
- Responsible for student debit card database management including student training, replacement of cards, identity verification requests, and all other related issues.
- Directs the processing, review, and submittal of 1098-T Tuition Statements.
- Establishes and maintains publications, training manuals, automated forms, and related processes and procedures.
- Coordinates services with other District departments and divisions and with outside agencies; coordinates a cooperative Bursar's functions and programs; interprets and ensures compliance with Federal and State codes and regulations and District Board policies and procedures related to the assigned function.
- Provides highly complex staff assistance to the Associate Vice President, Fiscal Services; develops and reviews staff reports and other necessary correspondence related to assigned activities and services; presents reports to various commissions, committees, and boards.
- Conducts a variety of organizational studies, investigations, and operational studies; recommends modifications to assigned programs, policies, and procedures, as appropriate.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations related to the Bursar's function; researches emerging products and enhancements and their applicability to District needs.
- Monitors changes in regulations and technology that may affect assigned functions and operations; implements policy and procedural changes after approval.
- Receives, investigates, and responds to difficult and sensitive problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.
- Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
- Provides a working and learning environment that is free from prohibited discrimination, harassment and retaliation (DHR), and provided by applicable law and District policies. Attends District mandated DHR training and participates in DHR investigations as directed. Prevents discrimination and harassment and retaliation against individuals who bring these complaints forward through recognizing and reporting possible incidents to the Director of Equal Employment Opportunity Programs in Human Resources.
- Performs other related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Administrative principles and practices, including goal setting, program development, implementation, and evaluation, and project management.
- Principles and practices of public agency budget development and administration and sound financial management policies and procedures.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Principles and practices of District finances, including accounts receivables, collections, student registration, financial aid, and other fees and revenue sources.
- Financial transactions related to student accounts and payments.
- Principles and practices of auditing.

- Automated accounting application and finance systems and computer software and systems related to accounts receivable; other computer applications related to work, including word processing, database, and spreadsheet software.
- Record keeping, information processing requirements, and rules and policies related to the maintenance of student accounts and payments.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Organization and management practices as applied to the development, analysis, and evaluation of programs and operational needs of the assigned department.
- Recent and on-going developments, current literature, and sources of information related to the operations of the assigned department.
- Record-keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, disabilities, socio-economic and ethnic groups.

**Skills & Abilities to:**

- Recommend and implement goals, objectives, and practices for providing effective and efficient services.
- Plan, organize, assign, review, and evaluate the work of staff; train staff in work procedures.
- Evaluate and develop improvements in operations, procedures, policies, and methods.
- Interpret, apply, explain, and ensure compliance with applicable Federal, State, and local laws, rules, regulations, policies, and procedures of accounting and basic student account processes.
- Effectively represent the department and the District in meetings with governmental agencies and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Review receivables and other financial documents for completeness and accuracy.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Make accurate arithmetic, financial, and statistical computations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Understand scope of authority in making independent decisions.
- Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*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:*

Equivalent to graduation from a regionally accredited four-year college or university with major coursework in accounting, finance, business, or a related field, and three (3) years of management and/or

administrative accounts receivables and governmental accounting experience. Experience in a Bursar's Office at in institution of higher education and experience with complex integrated Student Accounts Receivable enterprise application system are highly desirable.

### **PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 20 pounds.

### **ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.