Title: Chancellor's Office Financial Assistant
Unit: Confidential

Job Code: L1756
Original Date: 11/2026
Last Revision: 11/2026
Staff Type: Classified
FLSA status: Non-exempt
Salary Range: 24

DEFINITION

Under the direction of the Director of the Chancellor's Office, the Chancellor's Office Financial Assistant performs a wide variety of difficult, complex administrative, technical, and analytical accounting, budget tracking, and financial duties in support of the daily fiscal operations of the Chancellor's Office; tracking and monitoring auxiliary expenses; compiling, preparing, monitoring, auditing, and analyzing district expenditures related to payroll, purchasing, budget, grants, sponsorships, and contracts; reviewing and auditing office and executive Cabinet travel expenses for policy and regulatory compliance; reviewing financial and administrative documentation related to college accreditations, contracts, and special projects; conducting research and analytical reviews of financial accounts and submitting recommendations for the budget development process; processing purchase requisitions, travel reimbursements, vendor invoices, and service agreements; reviewing and proofing financial records, documents, and board agenda fiscal items for accuracy, completeness, and adherence to San Diego Foundation bylaws, applicable Ed Code regulations, applicable California law regulations, District Administrative Procedures, Board Policies compliance, and collective bargaining agreements; performing a variety of ad hoc financial duties and special projects; developing and maintaining cooperative working relationships with college and district divisions and departments; and performing related work to maintain office and district operations as assigned.

DISTINGUISHING CHARACTERISTICS

The Chancellor's Office Financial Assistant reports to the Director of the Chancellor's Office and supports executive leadership actively involved in collective bargaining, participating in the analysis, costing, and maintenance of collective bargaining financial proposals and district budgets. This classification requires a substantial amount of confidentiality, discretion, tact, independence, judgment, and initiative in handling sensitive fiscal, contractual, auxiliary, and executive travel data. Incumbents may be required to attend meetings regarding collective bargaining and financial strategy, including closed session meetings of the Board of Trustees.

EXAMPLE OF DUTIES

1. Compile, prepare, monitor, audit, and analyze District expenditures related to payroll, purchasing, budget, grants, contracts, and other division functions; conduct complex financial analyses and submit recommendations for the annual budget development process.

2. Audit and review travel reimbursements and expense reports for Chancellor's Office staff and executive Cabinet members to ensure strict compliance with District Administrative Procedures, Board Policies, and applicable regulations.

3. Track and monitor auxiliary accounts and expenditures; ensure financial compliance and alignment with San Diego Foundation bylaws, applicable California law regulations, and Ed Code standards.

4. Review financial and administrative documentation related to college accreditations, sponsorships, contracts, and special institutional projects to ensure fiscal accuracy, proper allocation, and policy compliance.

5. Process purchase requisitions, vendor invoices, service agreements, and disbursement requests; operate computers and business-related software to enter and extract data, and create and manage complex spreadsheets, financial documents, and reports.

6. Review and proof documents, financial records, agreements, and board agenda fiscal items for accuracy, completeness, and conformance to applicable Ed Code regulations, District Administrative Procedures, Board Policies, and collective bargaining agreements.

7. Independently provide information and assistance to others in locating, communicating, and interpreting District and division policies and procedures; exercise consistent policy interpretation related to the Education Code, bargaining agreements, government regulations, and other laws.

8. Conduct research and analyses of a paraprofessional nature; coordinate, plan, and organize special financial studies and analysis; compile, organize, arrange, and analyze data, and prepare reports.

9. Perform detailed administrative work regarding financial documents and agreements; establish and maintain complex, interrelated filing systems, both hard copy and electronic; perform confidential duties related to sensitive issues of the Board of Trustees, Chancellor, Chancellor's Cabinet, and bargaining proposals.

10. May provide work direction and training and act as a lead over other classified staff; and perform related duties as assigned

11. Perform related duties as assigned.

DESIRABLE QUALIFICATIONS

Knowledge:

- Applicable sections of the California Education Code, government regulations, San Diego Foundation bylaws, and District Board Policies and Administrative Procedures governing community college operations.
- Computer applications and business software, including advanced word processing, spreadsheets, and databases.
- Cultural competency and sensitivity to the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds of community college students and staff.
- District and Community College organization, operations, policies, terminology, and collective bargaining agreements.
- Effective oral and written communication skills using correct English grammar, spelling, punctuation, and vocabulary; and basic principles of administration, supervision, and lead training.
- Laws, regulations, policies, and procedures governing the preparation and review of Board of Trustees agenda items, public and closed session meetings, and official recordkeeping.
- Modern office management practices, procedures, and equipment, including confidential records maintenance and filing systems.
- Principles and practices of budget analysis, preparation, and maintenance; basic principles of accounting and bookkeeping; expenditure auditing; and financial recordkeeping techniques.

Skills and Abilities:

- Administrative & Technical Proficiency
- Confidentiality & Discretion
- Communication & Correspondence
- Financial & Analytical Processing
- Independent Operations & Work Management
- Interpersonal & Cultural Competency
- Leadership & Lead Direction
- Policy & Regulatory Application

Training and Experience:

Graduation from an accredited four-year college or university with a Bachelor's degree in Business Administration, Accounting, Finance, Public Administration, or a closely related field, and two (2) years of increasingly responsible executive administrative, fiscal, or analytical experience in a public agency or educational institution.

OR

Any combination of training and experience equivalent to: graduation from high school (or equivalent) supplemented by college-level coursework in business, accounting, or public administration, and four (4) years of increasingly responsible executive administrative, financial, or analytical experience, including at least two (2) years in a public agency or higher education setting, and one (1) year of experience providing lead direction or training to others

WORKING CONDITIONS

Physical Requirements:

Category III, usually minimum.

Environment:

Favorable, usually involves an office. May require travel between District sites.