

Sonoma County Office of Education – Job Description

Classified Management

SPECIAL EDUCATION FISCAL ANALYST

Definition:

To study, analyze, plan and perform the fiscal procedures and functions of the Special Education Local Plan Area (SELPA) and prepare and present fiscal reports to the SELPA Superintendent's Council and the Charter SELPA CEO Council; to act in an advisory capacity to districts and Charter LEAs in special education funding; to communicate with state and county/local administrators; to organize and conduct meetings with district administrators relative to SELPA fiscal matters, including revenue projections, apportionment calculations, program budgets for both County and Charter SELPAs and year-end closing documents.

Distinguishing Characteristics:

This job class requires knowledge of school accounting procedures, practices and methods, special education finance and is responsible for exercising considerable independent judgment and decision-making skills. The incumbent is in a position of trust and confidence.

Supervision Exercised and Received:

The incumbent is responsible for the overseeing and supervision of SELPA staff responsible for budgetary matters. The incumbent reports directly to and receives administrative supervision from the SELPA Executive Director or the Deputy Superintendent of Business Services.

Example of Duties and Responsibilities:

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

- Independently studies, plans, directs and coordinates the development and implementation of systems and procedures used to collect data necessary in the financial control of special education funding.
- Provides supervision of SELPA staff, including but not limited to, hiring and conducting performance evaluations.
- Completes required steps necessary to develop, audit and verify excess cost billing reports and procedures.
- Participates in governance committees to present and explain fiscal data, required reports and budget information.
- Reviews data collected for consistency and accuracy in compliance with state and federal law.
- Facilitates and makes recommendations on the development of budget information and completes preparation of budgets for submission to decision-making groups.
- Prepares special education fiscal and budget reports, for the California Department of Education, member districts and the governance committees.
- Keep current with Maintenance of Effort (MOE), Subsequent Year Tracking (SYT) Worksheet, and Federal Grant regulations and ensure proper disseminations of information to LEAs for both the County and Charter SELPAs. Test validity of collected data for submission to the CDE.

- Analyzes new legislation to determine the financial impact on special education income and communicates that impact as the primary fiscal advisor for the County Office of Education and/or the County and Charter SELPAs.
- Assists in the design, modification or update of special education funding allocation plan, budgeting and accounting systems and procedures for both the County and Charter SELPAs.
- Analyzes and reviews all funding sources in order to maximize revenues.
- Develops, implements and supervises systems and procedures to ensure adequate budgetary and/or internal controls.
- Provides financial inservice training to district, charter LEAs, and/or County personnel regarding special education budgeting and finance.
- Performs related duties as assigned.

Employment Standards:

Knowledge of:

- Generally accepted accounting procedures and standards including automated financial record-keeping systems.
- Principles, practices and techniques of fiscal and budgetary transactions with particular references to special education accounting.
- Financial analysis and research techniques.
- Laws and regulations applying to special education accounting operations.
- Data processing as it relates to financial records-keeping.
- Basic office methods, practices and procedures including financial record-keeping.
- Standard English usage, spelling, grammar and punctuation.
- Standard office machines and technology including computers.
- Safe work practices.

Ability to:

- Oversee, develop and coach employees as well as prepare and conduct performance evaluations.
- Respond promptly to requests of internal and external clients; provide needed information, assistance, training, materials and resources.
- Plan, organize and prioritize own work to meet deadlines and accomplish assigned tasks within established timelines including maintaining accurate records and files.
- Maintain an orderly work environment and perform tasks in prescribed and safe manner.
- Establish and maintain cooperative working relationships with those contacted during performance of job duties.
- Maintain and improve professional skills and knowledge.
- Be flexible and receptive to change.
- Understand and apply principles, techniques and procedures required for effective job performance.
- Apply the principles of governmental budgeting, auditing and accounting.
- Comply with laws and regulations applying to school district and charter accounting operations.
- Conduct financial analysis and do other statistical research.
- Plan, implement and participate in the preparation of accounting reports.
- Accurately check, verify and analyze a variety of accounting data and draw sound conclusions.
- Effectively train and work with others.
- Effectively communicate in both oral and written forms.

Computer Skills:

- Basic word processing skills, such as the ability to format, save files for cross-platform use and in different versions, work with toolbars, menus, and rulers, insert graphics, use borders, and print labels and envelopes.
- Basic database skills, such as the ability to sort and retrieve records; create layouts, reports, create and print mailing labels; perform mail merge for form letters; add, edit, delete fields and records.
- Basic spreadsheet skills, including the ability to open, modify, save, and print a new or existing spreadsheet and enter text and numbers.
- Basic email skills, including the ability to send and open a file attachment.
- Basic internet usage including the ability to utilize its resources for instructional purposes, use a search engine, bookmark a site, download a file, copy text, edit bookmarks and observe copyright regulations.

Education and Experience:

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

Education:

- Formal or informal education or training which ensures the ability to read and write at a level necessary for successful job performance supplemented by formal training in the principles, theory and standard procedures of accounting in school district finance is desirable.

Experience:

- Increasingly responsible, technical accounting or auditing experience, preferably some experience in special education finance in a California public school district or county office of education is highly desirable.

Physical Abilities:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Positions in this classification work indoors and sit for long periods of time.
- The position requires daily oral communication in person and on the telephone and frequent written communication.
- Requires speaking and hearing ability sufficient to hear over the phone and carry on routine conversations.
- The work involves operating a computer, calculator, copier and other equipment and involves repetitive arm and hand movement.
- Requires hand-eye-arm and finger dexterity to use a personal computer keyboard, ten-key and other common office equipment.
- Entering data by touch requires the ability to hear computer alarms for errors.
- Forms and copies are color coded, requiring the ability to distinguish among colors.
- Lifting twenty (20) pounds on an occasional basis and in excess of twenty (20) pounds with assistance.
- Requires visual acuity sufficient to recognize people, words and numbers.

Work environment:

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

Other Requirements:

- Must be fingerprinted and satisfactory Department of Justice and Federal Bureau of Investigation records checks must be received by Sonoma County Office of Education, prior to employment.
- TB testing will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- Visual acuity sufficient to read manuals, video display screens, and other related material and work at a computer screen frequently and throughout the day.
- May be required to obtain first aid and CPR certificates within the first 6-12 months of employment.
- May be required to drive with or without students; some positions may require a current California driver license, proof of insurance and possible participation in the DMV Pull Notice Program once employed.

Other:

- Revised: June 22, 2020
- FLSA Status: Exempt
- Bargaining Unit: Unrepresented
- Approved by: Personnel Commission