

**JOB DESCRIPTION**  
**San Diego County Office of Education**

**Business Advisor**

**Purpose Statement**

The job of Business Advisor is done for the purpose/s of providing consulting services to school districts with specific responsibility for ensuring that overall fiscal policies, practices and/or regulations meet compliance requirements; maintaining accurate account balances; evaluating feasibility of services within budget parameters; ensuring efficient use of financial resources; and providing financial information, guidance and recommendations to the district administration.

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**Essential Functions**

- Analyzes financial information (e.g. school districts, charter schools, etc.) for the purpose of identifying potential budget variances, compiling statistical information, developing procedures, and conforming to established financial practices and regulatory requirements.
- Assists school districts and charter schools in a variety of support functions regarding business services (e.g. assisting in grants, special funding, business officers, accounting and general business functions, etc.) for the purpose of ensuring compliance with the fund account and generally accepted accounting principles.
- Assists auditors for the purpose of providing requested supporting documentation, information on internal processes, and/or coordinating activities in support of the audit process.
- Compiles statistical and financial data (e.g. school districts and charter schools, etc.) for the purpose of providing third-party reporting; developing budget recommendations; providing financial summaries to other personnel, and/or ensuring compliance with established guidelines.
- Consults with assigned school districts for: funding programs, accounting systems, administrating student organizations, and regarding school business practices, etc. for the purpose of implementing and maintaining services and/or programs in accordance with established financial policies, practices, laws and/or regulatory guidelines.
- Coordinates a wide variety of accounting projects (e.g. database development, annual budgets, grant reports, etc.) for the purpose of providing required guidance and support.
- Develops reporting processes, procedures and internal controls (e.g. fixed asset policy development, state regulations and requirements, etc.) for the purpose of maintaining the efficient flow of financial processes.
- Implements accounting procedures (e.g. LCAPS, budgets, reports, etc.) for the purpose of providing internal financial controls throughout the organization and ensuring compliance with established accounting practices and all applicable regulatory requirements.
- Monitors expenditures against budget and/or a wide variety of account information (e.g. fiscal status of each school district, etc.) for the purpose of ensuring the accuracy of reported information, availability of funds, cash flow, and compliance with established financial guidelines and program policies, practices and regulatory requirements.
- Participates in unit meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.

- Prepares a wide variety of finance-related documents (e.g. reports, operating recommendations, policies, etc.) for the purpose of documenting activities, providing written reference, and/or conveying information.
- Presents a wide variety of financial and reported information (e.g. budget overviews, accounting processes, distribution formulas, etc.) for the purpose of communicating information, gaining feedback and ensuring adherence to established internal controls.
- Recommends policies, procedures and/or actions on issues that relate to financial operations (e.g. adopted budgets, interim reports, unaudited actuals, new non-voter-approved debt, etc.) for the purpose of providing direction and/or making decisions for the district.
- Reconciles fiscal information and account balances (e.g. for school districts and charter schools, etc.) for the purpose of verifying accuracy of information, maintaining accurate balances and complying with accounting practices.
- Researches a wide variety of financial and administrative topics for the purpose of providing information and/or recommendations that impact the organizations operations.
- Responds to inquiries from a wide variety of internal and external sources (e.g. school districts, charter schools, insurance companies, government agencies, etc.) for the purpose of providing information, direction and/or appropriate referrals.

### **Other Functions**

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment using pertinent software applications; performing accounting procedures; planning and managing projects; preparing and maintaining accurate records; analyzing budgets; analyzing data; auditing financial reports; classifying data and/or information.

KNOWLEDGE is required to perform advanced math; read technical information, compose a variety of documents, and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: principles of accounting and auditing; general governmental accounting practices; standard office practices and procedures; and pertinent codes, policies, regulations and/or laws; accounting/bookkeeping principles; bookkeeping practices; business telephone etiquette; codes/laws/rules/regulations/policies; cost/fund accounting; keyboarding; quantity cooking.

ABILITY is required to schedule activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use basic, job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of widely varied types and/or purposes; and utilize job-related equipment. Problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate. Specific ability based competencies required to

satisfactorily perform the functions of the job include: analyzing a variety of financial and statistical information; working under time constraints; communicating with diverse groups; meeting deadlines and schedules; setting priorities; and working with detailed information; accuracy and attention to detail; maintaining confidentiality; working as part of a team; working with detailed information/data.

**Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; directing other persons within a small work unit; directing the use of budgeted funds within a work unit. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

**Working Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 90% sitting, 5% walking, and 5% standing. This job is performed in a generally clean and healthy environment.

Experience Five years of directly related experience in professional level accounting, budget development and budgetary analysis, and financial forecasting. School business management experience is strongly preferred.

Education Bachelors degree in job-related area.

Equivalency Any combination of education and experience equivalent to a bachelor's degree with major coursework in accounting, auditing, finance, business administration, public administration or a related field from an accredited college or university, and five years of directly related experience in professional level accounting, budget development and budgetary analysis, and financial forecasting. School business management experience is strongly preferred.

Required Testing

N/A

Certificates

Valid CA Driver's License

Continuing Educ./Training

N/A

Clearances

Criminal Justice Fingerprint/Background Clearance

Drug Screening

Proof of physical examination including TB Screen

FLSA State: Exempt

Salary Range: Classified Management, Grade 47

Personnel Commission Approved: October 19, 2016

Revised: 1/16/2019