

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

**Business Specialist**

**Purpose Statement**

The job of Business Specialist is done for the purpose/s of providing support to department activities with specific responsibility for performing professional accounting, budget analysis and review related to the compilation, evaluation and reporting of revenue and expenditures; and providing comprehensive fiscal knowledge and technical assistance in support and service of the Internal Business Department to County Office departments and programs.

This job is distinguished from similar jobs by the following characteristics: Business Specialist: This is the first level professional classification in this series. Incumbents in this class possess an understanding of the accounting and budget processes, internal controls, bookkeeping procedures, automated accounting systems, fund accounting encumbrances, accounting system requirements and knowledge of applicable laws, statutes, rules, codes and ordinances.

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**Essential Functions**

- Analyzes, reconciles, and/or evaluates the accuracy of general ledger, accounting details, revenues, expenditures, accounting/budget/financial reports, etc. for the purpose of assuring proper amounts, receipt and classification in compliance with state and federal laws, reporting and procedural requirements for County Office financial activities.
- Collaborates with County Office personnel and others for the purpose of obtaining and/or imparting information related to financial and administrative operations and explaining procedure and regulations.
- Compiles statistical and financial data for the purpose of providing third-party reporting; developing budget recommendations; providing financial summaries to other personnel, and/or ensuring compliance with established guidelines.
- 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.
- Gathers data and performs special studies and investigations on budget matters and various problems arising in connection with financial administration for the purpose of analyzing, reviewing and making recommendations on budgetary and fiscal matters.
- Monitors, analyzes and/or reviews financial summary and detailed reports, program budgets, documents, studies or records for accuracy, proper account charges, coding and compliance, etc. for the purpose of implementing corrections and fund transfers, resolving discrepancies as necessary and/or processing documents for input into automated systems.
- Operates computers and related software, peripheral equipment and standard office equipment for the purpose of utilizing computer-based financial, budget and administrative systems.
- Participates in unit meetings, in-service training, workshops, committee meetings, 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. journal entries, complex bank reconciliations, charts, complex spreadsheets and databases, budget and financial analysis work, etc.)

for the purpose of documenting activities, providing written reference, and/or conveying information.

- Processes a variety of budget requests for the purpose of ensuring compliance with regulations, policies and principles of sound financial management.
- Trains County Office staff for the purpose of conveying pertinent information and providing technical expertise and advice regarding accounting, budget and financial matters, revision and reporting, accounting corrections, appropriateness of transactions and/or automated accounting/financial systems.

### **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: analyzing budgets; analyzing data; applying job-related codes, regulations and laws; auditing financial reports; classifying data and/or information; conducting financial transactions; operating standard office equipment and office technology; performing accounting procedures; performing standard bookkeeping procedures; preparing and maintaining accurate records.

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; budgeting; bookkeeping and fiscal recordkeeping; and pertinent codes, policies, regulations and/or laws.

ABILITY is required to schedule activities, meetings, and/or events; gather, collate, and/or classify data; and use basic, job-related equipment. Flexibility is required to 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 wide diversity of individuals; work with data of 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 frequently requires independent interpretation of guidelines; and problem solving with equipment is limited to 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; formulating and executing decisions involving complex issues in accordance with laws, regulations, and established administrative procedures; and working with detailed information.

### **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 may be 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: Job related experience with increasing levels of responsibility is required.

Education: Bachelors degree in job-related area.

Equivalency: Business Specialist: 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 at least one year of work experience in professional accounting and fiscal control; in the absence of a degree, five years of progressively responsible financial or fiscal control work in a school district, county office of education or related public agency.

Required Testing

Certificates

Driver’s License & Evidence of Insurability

Continuing Educ./Training

Maintains Certificates and/or Licenses

Clearances

Criminal Justice Fingerprint/Background Clearance  
Tuberculosis Clearance

FLSA State: Non-Exempt

Salary Range: Classified Management, Grade 30

**Personnel Commission Approved: October 19, 2016**