

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

**Director, Business Advisory Services**

**Purpose Statement:**

The job of Director, Business Advisory Services is done for the purpose/s of planning, coordinating and directing the functions of the Business Advisory Services Unit; providing financial, budgetary and general business management support to school districts within the County; coordinating AB 1200 fiscal oversight of school districts within the County, including technical assistance and oversight for school districts identified as being in fiscal distress and needing additional assistance on all fiscal issues.

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**Essential Functions:**

- Plans, organizes, directs, and administers the mandated functions of the Business Advisory Services portion of the division, which includes financial oversight of districts, analysis and approval of district budgets and other fiscal reports, certification of district fiscal data to the State, and projection of district revenue
- Assists in developing and coordinating appropriate budget and financial monitoring systems for the purpose of assuring fiscal compliance and integrity of local school district resources and expenditures.
- Assists in managing program and/or departmental responsibilities (e.g. fiscal oversight, business practices, financial systems, Federal and State programs, etc.) for the purpose of achieving organizational objectives, and ensuring compliance with legal and financial requirements.
- Monitors department financial and statistical compilation activities for the purpose of authorizing and approving reports for county school districts.
- Assists in overseeing school districts' budget approval and interim reporting for the purpose of advising districts concerning potential legality of expenditures and interpreting educational and administrative code.
- Provides hands on assistance to school districts operating outside the County ERP system regarding school business practices, budgeting, financial reporting, ERP systems, and to provide assurance of internal controls.
- Collaborates with external auditors for the purpose of reviewing districts' internal control procedures, and ensuring compliance with legal and financial requirements
- Consults with school districts identified as being in fiscal distress with regards to school business practices, budgeting, accounting systems, etc. for the purpose of implementing and maintaining services and/or programs in accordance with established financial policies, practices, laws and/or regulatory guidelines.
- Participates in and serves on various committees with school districts, county, state, community, agencies and professional organizations for the purpose of enhancing working relationships in the areas of business and finance and promoting efficiencies and cost savings.
- 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.

- Performs personnel administrative functions (e.g. interviewing, evaluating, recommends for hire, supervising, etc.) for the purpose of maintaining adequate staffing, enhancing productivity of personnel and achieving objectives within budget.
- Presents information on a wide variety of topics to districts and governing boards for the purpose of conveying information, gaining feedback and/or making recommendations regarding district services.
- Provides direct business consultant assistance to school districts for the purpose of assisting in general budget development, report preparation, legal requirements, purchasing and other business areas.
- Researches a variety of financial and business resource topics for the purpose of analyzing, coordinating and recommending positions on legislation relating to business and financial matters.
- Responds to a wide variety of inquiries concerning financial and business related issues for schools from internal and external sources (e.g. staff, district personnel, media, parents, auditors, taxpayers association, board of education, general public, etc.) for the purpose of identifying relevant issues that may result in some negative impact and/or liability if not properly addressed and recommending or implementing a plan of action to efficiently resolve the issue.
- Supports the Executive Director of District Financial Services for the purpose of developing and implementing services/ programs for achieving the operational goals.

### **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 periodically 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 including using a variety of software applications; planning and managing projects; and preparing and maintaining accurate records.

KNOWLEDGE is required of State Education Code, Revenue and Taxation Code and other statutes, codes, rules, and regulations pertaining to all areas of school business and finance; personnel processes; program planning and development; principles of public and fund accounting and budgeting; and principles and practices of public school business services administration including methods and techniques used in payroll, retirement reporting, financial accounting, legal research, commercial warrant processing and report processing.

ABILITY is required to schedule a number of activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing a variety of complex processes; and operate equipment using a variety of standardized methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize a variety of job-related equipment. Independent 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 to significant. Specific ability based competencies required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups and individuals; meeting deadlines

and schedules; setting priorities; working as part of a team; working with detailed information/data; developing and managing programs; training and supervising staff; and interpreting and applying complex laws, rules and regulations.

**Responsibility**

Responsibilities include: working independently under broad organizational guidelines to achieve unit objectives; managing multiple departments; supervising the use of funds for multiple departments. Utilization of resources from other work units is often required to perform the job's functions. There is some opportunity to significantly 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, 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 (5) years of recent professional-level business management experience directing and coordinating the business activities of a California public school district or other large public agency, including two (2) years of supervisory experience.

Education: Bachelor's degree in in business administration, accounting, finance, public administration, or closely related field.

Equivalency: A combination of education and experience equivalent to a business administration, accounting, finance, public administration, or closely related field, and five (5) years of recent professional-level business management experience directing and coordinating the business activities of a California public school district or other large public agency, including two (2) years of supervisory experience.

Required Testing

N/A

Certificates

Valid CA Driver's License

Continuing Educ./Training

Must maintain required certificates

Clearances

Criminal Justice Fingerprint/Background Clearance  
Physical Exam including drug screen  
Tuberculosis Clearance

FLSA State: Exempt

Salary Range: Classified Management, Grade 50

**Personnel Commission Approved: March 20, 2019**