

JOB DESCRIPTION
San Diego County Office of Education

SPECIAL EDUCATION FINANCIAL EXPERT

Purpose Statement

Under general direction, the Special Education Financial Expert administers, coordinates, and plans the development, allocation, and reporting of complex financial activities for the Special Education Local Planning Area (SELPA) programs, County school districts, and charter schools; advises and serves as expert resource to SELPA, school district administrators, and charter schools on special education financial and business-related matters.

This job is distinguished from similar jobs by the following characteristics: providing program fiscal support in that this classification requires specialized subject matter expertise in Special Education financing as well as extensive and directly related and progressively responsible experience performing highly specialized, complex and technical special education fiscal analysis and reporting.

ESSENTIAL FUNCTIONS:

Coordinates, and plans the development, allocation, and reporting of complex financial activities for the SELPA programs, County school districts, and charter schools; provides fiscal updates for SELPA directors; serves as a Special Education subject matter expert.

Analyzes California Department of Education (CDE) certifications, State budget assumptions, SELPA budget allocation plans, ADA reports, pupil counts and various revenue source reporting to plan, develop, prepare and update Special Education revenue projections.

Prepares and files federal IDEA expenditure reports with the CDE; collects related expenditure information from district programs and charter schools; calculates and submits to CDE the Special Education Maintenance of Effort (MOE) for the San Diego County Office of Education (SDCOE).

Distributes SDCOE Special Education property tax revenues to districts and SDCOE programs; determines appropriate amounts according to established guidelines; prepares and updates SELPA allocation of Special Education property tax reports for CDE certifications.

Researches, analyzes, interprets, and assures SDCOE, district, and charter school actions are in compliance with Education Code, laws, regulations, and court decisions; determines data needs for various financial reports; tests validity of collected data; reconciles, Special Education reports, tax, and apportionment to state and county reports.

Calculates and sets up accruals for Special Education State Aide and COE Special Education property tax transfers for district's year-end; calculates, balances, reconciles and performs Year-End closing entries and prepare related exhibits to districts and charter schools.

Performs a variety of budgeting, accounting and financial reporting in support of Special Education programs and projects; monitors fiscal activity, assuring expenditures do not exceed established budget limitations; calculates, prepares and revises accounting and budgetary data; balances and reconciles assigned budgets as required and processes budget adjustments as needed.

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Maintains records as required for compliance with local, state, and federal requirements; applies special education policies and current law and communicates information as it relates to SELPAs, districts, and charter schools; prepares and maintains a variety of manual and automated records and reports related to assigned activities.

Prepares, audits and files Special Education funding and administrative reports with the Department of Education and other regulatory agencies; prepares, distributes, and monitors budgets, revenue projections, and allocation plans and works with the SELPA to advise school districts and charter schools of financial implications.

Researches, and analyzes special education funding data, resolves problems, and develops worksheets and reports as needed; reviews special education certification documents; determines County Excess Tax distribution for the County Office, district programs, and charter schools.

Plans, directs and monitors special projects; confers with auditors; advises and answers financial questions for school districts and charter schools related to Special Education funding; leads and facilitates discussions with districts and charter schools related to Special Education funding in collaboration with the SELPA.

Maintains current knowledge of laws, rules, regulations and policies related to special education finance; monitors school business legislation; interprets and analyzes policies and regulations; directs and participates in the analysis of legislation and disseminates information on the impact of legislation; provides districts and charter schools with periodic information regarding Special Education funding.

Establishes and maintains a variety of correspondence, records, and files related to assigned activities; responds to telephone and email questions regarding SELPA fiscal questions; meets with administrators and program managers as needed to provide direction and technical and procedural assistance.

Develops complex spreadsheets for revenue projections; serves as information source regarding fiscal procedures, policies, requirements, and standards for Special Education.

Prepares and presents the materials needed for the District Financial Services Budget Workshop.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Principles and practices of accounting, budget, auditing, and fiscal administration;
Federal, state and local laws relating to California school accounting and finance;
Principles, practices, and techniques of organization and business management in public agencies;
Preparation of financial statements and comprehensive accounting reports;
Financial projection and statistical/record-keeping techniques;
Financial analysis and research techniques;
Computer information systems operations, capabilities and applications relating to accounting, budget development, and financial management;

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Principles of supervision and budget management;
Principles of implementing diversity in the workplace.

ABILITY TO:

Coordinate and administer the functions and activities in assigned area of responsibility;
Provide financial analysis and develop financial models based on historical and projected trends for educational organizations;
Perform specialized and technical services requiring application and interpretation of data, facts, procedures and policies;
Interpret, analyze, and apply laws, codes, regulations and court decisions affecting schools and special education;
Provide functional and technical guidance in obtaining, preparing, sharing and exchanging data with outside agencies and administrative, technical, clerical personnel;
Prepare clear and concise financial and accounting analysis reports;
Interpret, apply and explain rules, regulations, policies and procedures;
Operate a computer and assigned software to enter data, maintain records and generate reports;
Evaluate and project annual income and expenditures to determine budget requirements;
Maintain accurate financial and statistical records;
Analyze financial data and prepare reports, forecasts and recommendations;
Work independently with little direction;
Meet schedules and time lines, and plan and organize work effectively;
Communicate effectively both orally and in writing;
Prepare and deliver presentations to a variety of audiences;
Establish and maintain cooperative and effective working relationships with others.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

PHYSICAL DEMANDS:

Dexterity of hands and fingers to operate a computer keyboard. Seeing to read a variety of materials. Hearing and speaking to exchange information. Bending at the waist, kneeling or crouching to retrieve and file materials. Sitting for extended periods of time.

EDUCATION AND EXPERIENCE:

Experience: Five (5) years accounting experience related to special education programs in an educational organization, including work with budgetary and fiscal systems, models and procedures.

Education: A bachelor's degree in accounting, finance, economics, business administration, or related field.

Equivalency: A combination of education and experience equivalent to a bachelor's degree in accounting, finance, economics, business administration or related field and five (5) years accounting experience related to special education programs in an educational organization, including work with budgetary and fiscal systems, models and procedures.

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Required Testing

N/A

Certificates/Credential

Valid CA Driver's License

Continuing Educ./Training

As needed to maintain required certificates.

Clearances

Fingerprint/Background Clearance
Medical Exam, including drug screen
Tuberculosis Clearance

FLSA Status: Exempt

Salary Range: Classified Management Grade 044

Revisions:

Personnel Commission Approval: May 29, 2019