

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

**DIRECTOR, BUDGET AND ACCOUNTING**

**Purpose Statement:**

The job of Director, Budget and Accounting is responsible for directing, planning, and coordinating, the budget and accounting functions of the Internal Business Services Unit; providing financial, budgetary, and general business management support to departments within the County Office of Education; coordinating activities and operations of the budget and accounting departments.

---

**Diversity Statement:**

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

**Essential Functions:**

- Plans, organizes, directs, and administers the mandated functions of the Budget and Accounting portion of the internal business department, which includes financial oversight of departments, analysis and approval of department budgets and other fiscal reports, certification of SDCOE fiscal data to the State, and projection of SDCOE revenue.
- Assists in developing and coordinating appropriate budget and financial monitoring systems for the purpose of assuring fiscal compliance and integrity of resources and expenditures.
- Assists in managing program objectives 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 SDCOE.
- Assists in overseeing department budget approval and interim reporting for the purpose of advising departments concerning potential legality of expenditures and interpreting educational and administrative code.
- Provides hands on assistance to departments regarding school business practices, budgeting, financial reporting, and to provide assurance of internal controls.
- Collaborates with external auditors for the purpose of reviewing SDCOE's internal control procedures and ensuring compliance with legal and financial requirements.
- 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.
- Analysis of SDCOE enterprise programs such as Outdoor Education, Graphics, and ITV. Ensure programs are self-sufficient and if not, working with departments on ways to increase revenues and or decrease expenditures to reduce encroachment of the general fund.

- Analysis of JCCS ADA, Base, Supplemental and Concentration funding, and impacts to general fund. Property Tax analysis and calculations. LCAP reviews and fiscal impacts; budget overview for parents.
- 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.
- Resolve issues, review documentation, update board policies and ARs; Coordinate budget adoption, interims, and year-end unaudited actuals; 1099 reporting; travel and expense. Ensure compliance with policies, regulations, GAAP, GASB accounting standards and requirements. Ensure proper internal controls within our department and organization.
- Presents information on a wide variety of topics to departments and the governing board for the purpose of conveying information, gaining feedback and/or making recommendations regarding SDCOE services.
- Provides direct assistance to departments for the purpose of assisting in general budget development, report preparation, legal requirements, 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 departments from internal and external sources (e.g. staff, vendors, 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 Internal Business Services for the purpose of developing and implementing services/ programs for achieving the operational goals.

**Other Functions:**

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

**Job Requirements: Minimum Qualifications:**

**Knowledge and Abilities**

KNOWLEDGE 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;

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 TO:

Promote a human-centered culture that elevates the strengths of others creating a sense of belongingness;

Practice cultural competency while working collaboratively with diverse groups and individuals;  
Schedule a number of activities, meetings, and/or events;  
Routinely gather, collate, and/or classify data;  
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;  
Operate equipment using a variety of standardized methods.  
Work with a significant diversity of individuals and/or groups;  
Work with data of varied types and/or purposes;  
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  
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

**Working Environment:**

**ENVIRONMENT:**

Duties are typically performed in an office setting.

May be designated in an alternate work setting using computer-based equipment to perform duties.

**PHYSICAL ABILITIES:**

Must be able to hear and speak to exchange information; see to perform assigned duties; sit or stand for extended periods of time; possess dexterity of hands and fingers to operate computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files; lift light objects. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

**Education and Experience:**

**Education:** Five (5) years of professional-level experience with broad exposure to budgeting, purchasing, contracting and legal considerations, including three (3) years as a manager directing and supervising a major fiscal unit. School district business experience is strongly preferred; and

**Experience:** Bachelor's degree in business administration, public administration, accounting, or closely related field.; or

**Equivalency:** A combination of education and experience equivalent to a bachelor's degree in business administration, public administration, accounting, or closely related field, and five (5) years professional-level experience with broad exposure to budgeting, purchasing, contracting and legal considerations, including three (3) years as a manager directing and supervising a major fiscal unit. School district business experience is strongly preferred.

Required Testing

N/A

Certificates, Licenses, Credentials

Valid California Driver's License

Continuing Educ./Training

N/A

Clearances

Criminal Justice Fingerprint/Background Clearance

Physical Exam including drug screen

Tuberculosis Clearance

FLSA Status: Exempt

Salary Grade Classified Management, Grade 050

**Personnel Commission Approved: May 17, 2023**

Revised: N/A