

SANTA BARBARA COUNTY EDUCATION OFFICE
Personnel Commission

School District Financial Advisor

Basic Function

Under the direction of the department administrator, perform a wide range of research, planning, analytical, administrative, interpretive, and advisory tasks as required for the implementation of business services to school districts and community colleges; implement and provide support for the financial system; assist school districts in all phases of school financial and business matters; audit and perform complex accounting functions in support of assigned school districts within Santa Barbara County; be a resource for school districts and the Santa Barbara County Education Office (the Office) in assigned topic areas; perform related duties as assigned.

Essential Duties and Responsibilities

- Provide advice, counsel, preparation, review, and statistical analysis to school districts regarding all phases of school finance and business matters including but not limited to the financial system, budgets, payroll, Average Daily Attendance (ADA), enrollments, California Basic Educational Data System (CBEDS), Revenue Limits, transportation, governing board agenda items, risk management, joint powers agreements, property and liability and health insurance, unemployment insurance, apportionments, tax reports and other matters having financial impact.
- Evaluate and advise districts regarding the need for automating accounting and financial records and procedures including how to access related features of the financial system.
- Review and process state, federal and agency reports; identify and articulate necessary modifications to reports within the financial system.
- Instruct, coordinate and compile mandated reports.
- Assist school districts' accounting personnel in all aspects of their business office organization, policies and operating procedures; provide counsel or improvement of efficiency and effectiveness as necessary.
- Provide districts with up-to-date and detailed analysis of pending or chaptered legislation that has financial impact on school districts; interpret legislation and summarize impact.
- Using the financial system, monitor the fiscal solvency conditions of school districts, interpret and review district revenue and expenditure projections and probable cash flow impact and provide independent projections as necessary in order to assist districts in remaining solvent.
- Act as a liaison between state, county, the Office and school districts; act as a liaison between the financial system vendor, the office and the school districts.
- Identify district and the Office business services training needs related to business services and the financial system; prepare and present workshop/training sessions.
- Select, train, supervise, and evaluate assigned personnel, providing sustained leadership and coordination for the staff of the department. Attend workshops and meetings in the areas of school business and finance, and as necessary or requested, provide the staff of the Office and school districts with reports and interpretations of such meetings.
- Perform other essential job-related duties as assigned.

Qualifications

Knowledge and Skills

Requires in depth knowledge of business and management principles and techniques, finance and accounting methods, principles, and practices; payroll; technical aspects of the field of education and related legal codes, data processing principles and techniques including personal computers; industry standard word processing, spreadsheet and database programs and proficiency in the use of these and related programs; exposure to web-based software programs, web-interface, and understanding of user perspective and efficiency; modern office practices, procedures, and equipment; record-keeping techniques; confidentiality; excellent customer service skills; excellent oral and written communication skills.

Abilities

Learn, understand and conceptualize the financial system including the identification of necessary modifications for improved efficiency and usability; analyze complex accounting records and determine proper course of action to resolve fiscal issues; make arithmetic calculations quickly and accurately; understand and follow complex oral and written directions; work cooperatively with others to establish and maintain a calm, tactful, friendly, and diplomatic manner and effective working relationships; receive complaints and take steps to facilitate resolution; monitor assignments to achieve planned targets or schedules; plan and organize work and initiate new projects; communicate effectively both orally and in writing; manage a variety of tasks concurrently; work independently with moderate supervision; interpret complex legal and technical material; express complex concepts or issues in concise, simple terms to a variety of people with varying levels of interest and understanding.

Physical Abilities

Incumbent must be able to function effectively indoors in an office environment engaged in work of primarily a sedentary nature. Requires the ability to sit at a workstation for extended periods of time. Requires near visual acuity to read written materials and computer screens. Requires hearing and speech ability for ordinary and telephonic conversations and to hear sound prompts from equipment. Requires sufficient hand-eye and finger dexterity to write, use a keyboard and mouse or other pointing device. Requires the ability to retrieve work materials. Requires the ability to perform rapid data entry.

Education and Experience

Demonstrated success in a responsible position at a similar level and any combination equivalent to a Bachelor Degree in accounting, business administration or a related field, and three years experience in business or education at a professional level, preferably within a school district or county office environment.

Licenses and Certificates

Incumbents in this class may be required to possess a valid California driver's license.

Working Conditions

Typical office environment; travel from site to site; work is performed indoors with minimal exposure to health and safety risks.

APPROVED BY THE PERSONNEL COMMISSION:

April 21, 1994

REVISED BY THE PERSONNEL COMMISSION:

March 28, 2002

April 23, 2009

November 19, 2015