

JOB DESCRIPTION

San Diego County Office of Education

PROGRAM MANAGER, FISCAL SERVICES

Purpose Statement:

The Program Manager, Fiscal Services, is responsible for providing technical leadership in the administration of fiscal operations, systems management, and compliance monitoring to support County Office divisions, SELPAs, and programs, including fiscal activities that intersect with school districts or external stakeholders in the context of SDCOE operations, oversight, or reporting requirements; and may supervise and evaluate the work of professional-level budget and accounting staff.

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.

Representative Duties:

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties.

Distinguishing Characteristics:

A Business Advisor provides advisory services to promote the fiscal health of school districts by evaluating their fiscal systems. This role involves building and maintaining long-term, collaborative relationships with external clients. A Program Manager, Fiscal Services performs complex analytical and technical work to support the County Office's internal fiscal operations, including accounting, budgeting, and compliance functions. The Program Manager regularly leads projects and grant compliance involving external clients and may supervise professional-level accounting and budget staff. A Senior Program Business Specialist performs similar functions in support of one or more assigned SDCOE programs and may oversee the work of technical staff.

Essential Functions:

- Manages, coordinates, and provides oversight to financial processes related to budget control, fund accounting, compliance, and reporting functions that may include SDCOE programs, SELPAs, and divisions, school districts, or external stakeholder financial activities, including budget control, grant compliance and reporting, position management, or financial systems analysis.
- Compiles and analyzes data from multiple sources, prepares complex financial reports, and

makes recommendations to advise senior leadership regarding assigned fiscal areas of responsibility.

- Serves as a resource and communicates with SDCOE staff, districts, and outside organizations to exchange information and resolve issues or concerns.
- Analyzes and interprets proposed and adopted legislation and advises and conducts informational meetings with senior leadership and staff of possible impact.
- Facilitates and leads a variety of meetings and trainings on the budgeting and accounting requirements of grants and special programs; develops, revises, and directs the transmission of training materials, such as procedure manuals, memoranda, reference guides, and bulletins regarding budget transfer, expenditure allocation, grant management, and other fiscal matters.
- Develops templates and tools for use across departments in budget and compliance tracking.
- Coordinates and develops systems for maintaining legal compliance of assigned federal, state, and local projects and programs.
- Manage and participate in the preparation and maintenance of a variety of narrative and statistical reports, records, and files related to assigned activities; audit various records, reports and statements for accuracy and completeness; make corrections and adjustments as needed; develop spreadsheets and generate computerized reports.
- Directs and prepares reports and financial statements
- Develops and prepares reports and financial data for claims and fiscal audits
- Supervises, trains, and evaluates assigned professional and/or technical staff.

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:

Human centered and socially conscious leadership;

Principles and practices of public administration, with emphasis on budget and fiscal affairs;

County Office, school district, or school budgetary practices and procedures;

Basic structure of K-12 educational financial and accounting systems;

Principles, and practices of County Office and school district financial management, including budgetary and accounting procedures and principles;

Methods used in budget development and administration; and fiscal controls and codes;

Financial practices, procedures, and methodology used at the school and County Office levels;

Financial regulations of regular/specially funded programs and grants;

Basic application of data processing systems to budgetary records and reports;

Spreadsheet and financial accounting software;

Office methods, organization, and procedures;

Principles of supervision.

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;
Analyze complex budgets; fiscal controls, procedures, and systems; and financial legislation;
Work effectively and diplomatically and maintain good relations with a wide variety of individuals and groups;
Use critical judgment in the evaluation of data and the development of clear, concise budget plans, procedures, training materials, and reports;
Present clear and effective oral communication and written reports;
Plan work to meet deadlines;
Maintain confidentiality;
Conduct and participate in meetings.

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: A bachelor's degree from a regionally accredited college or university in accounting, finance, business administration, economics, or related field.; and

Experience: Five (5) years of professional-level experience providing budgetary and financial oversight services; including at least three years of experience involving financial analysis, compliance review, or fiscal control of governmentally regulated projects, programs, or budgets. A master's degree in business administration, public administration, accounting, or finance, may be substituted for up to one year of the required financial analysis experience.; or

Equivalency: A combination of education and/or experience equivalent to a bachelor's degree from a regionally accredited college or university in accounting, finance, business administration, economics, or related field; and five (5) years of professional-level experience providing budgetary and financial oversight services; including at least three years of experience involving financial analysis, compliance review, or fiscal control of governmentally regulated projects, programs, or budgets.

Required Testing

N/A

Certificates, Licenses, Credentials

N/A

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 042

Established: 06/2025

Personnel Commission Approved: June 18, 2025