

JOB DESCRIPTION

San Diego County Office of Education

PROGRAM MANAGER, JPA FISCAL SERVICES

Purpose Statement:

The Administrator, JPA Fiscal Services, provides technical leadership and oversight in the management of two Joint Powers Authorities (JPAs) serving all member agencies. The Administrator, JPA Fiscal Services is also responsible for managing financial reporting, compliance monitoring, and audit coordination. The Administrator ensures the integrity of financial systems, oversees financial reporting and compliance, coordinates audits, and supports both internal and external stakeholders with expert fiscal guidance, 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, JPA Fiscal Services** performs complex analytical and technical work to support both the County Office's internal fiscal operations for the JPA program and the JPA's external LEA members, 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:

- Serves as the fiscal agent for both JPA's, ensuring compliance with JPA charters, regulatory guidelines, and contractual obligations across all member LEA's.
- Assists with developing and implementing insurance contribution models and funding strategies, coordinating with brokers and actuaries to determine rates that ensure fiscal stability and risk pool integrity.

- Administers large scale cash transfers and fund reallocations between multiple bank accounts to ensure liquidity and coverage of high value claims.
- Maintain and reconcile individualized accounting structures for all member agencies, ensuring fiscal compliance, accurate fund allocation, and audit readiness in accordance with JPA charters.
- Exercises autonomous decision-making authority over daily financial operations and high consequence fiscal decisions, escalating only major exceptions to executive leadership.
- Develop and manage detailed, multi-million dollar budgets for the two JPAs, ensuring appropriate allocation of funds and compliance with financial regulations.
- Provide strategic fiscal advice to senior leadership, including superintendents and chief business officers, in relation to the financial health and operations of the JPAs.
- Serve as the primary liaison with external auditors, legal counsel, and insurance providers, coordinating audits and ensuring timely, accurate financial reporting that protects the JPAs' interests.
- Manages, coordinates, and provides oversight to financial processes related to budget control, fund accounting, compliance, and reporting functions that may include SDCOE programs 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 JPA self-insured and fully-insured programs, 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.
- 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;
JPA specific fiscal management;
Auditing principles;
Insurance industry practices;
Advanced financial reporting and reconciliation;
Workers compensation and rate setting;
Audit coordination and compliance;
Bank account and cash management;
Financial software and systems;
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;
Ensure compliance with financial regulations;
Exercise independent judgement;
Provide strategic fiscal guidance;
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 and/or auditing services; including at least three years of experience involving financial analysis, compliance review, or fiscal control of governmentally regulated projects, programs, or budgets. Experience in the insurance industry is highly desirable. 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 and/or auditing services; including at least three years of experience involving financial analysis, compliance review, or fiscal control of governmentally regulated projects, programs, or budgets. Experience in the insurance industry is highly desirable.

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 15, 2025