

## PROGRAM COMPLIANCE ANALYST

### DEFINITION

Under the direction the Associate Superintendent, SELPA, perform a variety of functions related to establishing, analyzing, monitoring and maintaining manual and automated records for the Special Education Local Plan Area (SELPA) programs and LEAs to ensure compliance with program regulations, rules, policies and applicable laws; review and analyze designated budgets, funds and accounts; maintain and monitor SELPA-wide special education reporting, monitoring, and analysis; provide leadership, management, and coordination of the various data and fiscal management systems; advise and serve as an expert resource to SELPA and LEA administrators on special education data and funding compliance and related matters.

### SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. Exercises no direct supervision over staff.

### EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Analyze, assist in the preparation, monitor and maintain the SELPA budget to ensure compliance with program guidelines and regulations; ensure that SELPA funding complies with applicable rules, regulations, policies, procedures and laws; review, monitor and recommend special education funding compliance protocols and policies to meet regulatory standards
- Maintain, facilitate, and monitor SELPA-wide Special Education Data Systems (SEDS) and California Longitudinal Pupil Achievement Data System (CALPADS) reporting, communicate any updates and changes to member LEAs from the California Department of Education (CDE)
- Gather, research and analyze special education data; input a wide variety of financial and statistical data into an assigned computer system; establish and maintain automated records and files; initiate queries, manipulate data, and develop a variety of fiscal/budget and special education data reports to distribute to LEAs as appropriate; ensure accuracy of input and output data
- Assist in developing and executing work plans and protocols to conduct internal control reviews and assessments for compliance purposes; serve as a liaison to various agencies (e.g. County Office committees, interagency boards) for the purpose of explaining compliance procedures, and conveying and/or receiving information related to special education program funding and data reporting requirements

- Provide consultation to administrators and LEA personnel concerning special education funding and/or data reporting; respond to inquiries and serve as informational resource to provide technical information and advice concerning special education compliance requirements including but not limited to: accounts, budgets, standards, practices, transactions, records, reports, requirements, laws, codes, regulations, policies and procedures; confer with county and state compliance monitoring staff to provide required information and documents as appropriate and in accordance with established timelines
- Attend SELPA Governing Board meetings and other SELPA meetings, as appropriate; serve as fiscal, data, and technical resource to the SELPA Governing Board and provide information, analysis and advice as requested
- Create databases, initiate queries, compile information, and organize data as needed for the purpose of SELPA fiscal allocation and distribution of funds as assigned; communicate, consult with, and provide feedback to CDE on known issues affecting data certification; provide input concerning the development and implementation of practices, policies, and procedures to ensure data supports compliance requirements
- Prepare and file special education funding and administrative reports with the California Department of Education and other applicable regulatory agencies; prepare and maintain financial reports related to SELPA including, but not limited to, the Local Plan – Annual Budget Plan and Annual Service Plan, Maintenance of Effort documents, and federal grant expenditures reports; review various special education documents from LEAs such as comprehensive coordinated early intervening services (CCEIS) reports to ensure accuracy, completeness and compliance with established guidelines
- Collaborate with County Office Business Services relative to disbursement of County Office excess tax distribution and other fiscal matters as appropriate; assist in the preparation, development and revision of designated budgets as assigned; forecast revenue and expenditures; analyze budgetary data and provide input to administrators and school districts concerning budgetary matters
- Develop and conduct professional development training to member LEAs and other applicable stakeholders on special education program funding and data reporting, monitoring, and compliance with relevant federal and state requirements; serve as a resource and subject matter expert to member district personnel to provide guidance and information related to special education funding and data reporting requirements; serve as a liaison to various agencies (e.g. district committees, interagency boards) for the purpose of explaining compliance procedures, and conveying and/or receiving information related to special education program funding and data collection
- Communicate with administrators, personnel and various outside organizations to exchange information, coordinate activities and programs and resolve issues or concerns
- Operate a variety of office equipment including a calculator, copier, fax machine, computer and assigned software
- Attend and participate in various meetings and workshops as assigned

- Perform related duties as assigned

## **QUALIFICATIONS**

### **Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

- Equivalent to a bachelor's degree in business, accounting, statistics, data science or related field
- Three (3) years' experience with varied responsibilities in program fund auditing, compliance, control and record-keeping, including experience with financial report preparation

### **Licenses and Certifications:**

This position may require employees to travel locally, and specifically, employees must be able get themselves to different locations during their workday. Employees will be responsible for ensuring that they can timely move between locations during their workday either via driving themselves with a valid driver's license or using other modes of transportation, including a ride hailing service, taking a taxi, carpooling, bicycling, etc.

### **Knowledge of:**

- Federal and state regulations, laws, and policies related to Special Education funding and data reporting
- Principles, methods and techniques of effective training programs
- Budget and regulatory compliance protocols and procedures
- Budget development and preparation methods and procedures
- Mandated federal and state Special Education reporting
- Various administrative financial and data reports related to the SELPA Local Plan, the Annual Budget Plan, Annual Service Plan and other Special Education administrative reports
- Fiscal assessment, monitoring and control techniques and methods
- Education Code and other rulings governing special education data including State and District operations, policies, and procedures
- Policies and objectives of Special Education programs and activities
- Principles, practices, procedures, and techniques involved in the research, collection, analysis, interpretation, and reporting of data
- Survey instruments, techniques, and methodology.
- Data verification and integrity techniques
- Record retrieval and storage systems
- Research and statistical evaluation techniques
- Operation of a computer and assigned software
- Effective oral and written communication skills
- Effective methods and techniques for presenting information

**Ability to:**

- Review, monitor and recommend Special Education funding compliance protocols and policies
- Serve as liaison between the San Mateo County Office SELPA and various agencies
- Attend SELPA Governing Board meetings and serve as technical resource and advisor in compliance special education funding and data compliance matters
- Prepare, audit and file a variety of mandated state and federal Special Education administrative reports
- Develop and conduct effective professional training programs
- Develop and conduct professional and effective presentations for various SELPA Board meetings and other relevant occasions
- Prepare and analyze comprehensive statistical reports
- Utilize a computer to input data, maintain automated records, initiate complex queries and generate a variety of data reports
- Analyze data, interpret findings, and provide recommendations
- Communicate effectively both orally and in writing
- Interpret, apply and explain rules, regulations, policies and procedures
- Establish and maintain cooperative and effective working relationships with others
- Determine appropriate action within clearly defined guidelines
- Meet schedules and timelines and retrieve and process documents through web-based systems to meet legal requirements
- Analyze financial data, prepare reports, and provide consultation to LEA Special Education administration
- Operate standard office equipment including a computer and assigned software
- Collaborate effectively as part of a team

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

**ENVIRONMENTAL CONDITIONS**

A person in this classification will work in an office environment, with controlled temperature conditions and no direct exposure to hazardous physical substances. An employee in this job class may interact with staff and members of the public under emotionally stressful conditions while interpreting and enforcing division rules and policies.