

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

**Special Education Financial Analyst**

**Purpose Statement**

The job of Special Education Financial Analyst is done for the purpose/s of administering , coordinating, and planning the development, allocation and reporting of complex financial reports and activities for a Special Education Program or SELPA; advising, coordinating and serving as expert resource on special education financial and business related matters.

This job is distinguished from similar jobs by the following characteristics: providing program fiscal support in that this classification requires specialized subject matter expertise in SELPA financing as well as extensive and directly related and progressively responsible experience performing highly specialized, complex and technical special education fiscal analysis and report are assigned to this classification. Incumbents in this classification are distinguished from other similar job classes in the direct contact they regulatory maintain with school district superintendents, SELPA financial advisory committees, and SELPA governing boards. Because the reporting relationship includes reporting to SELPA governing boards that rely solely on the incumbent's knowledge and expertise, the result of error distinguishes this position from similar positions that do not have the internal and external accountability.

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**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**

- Advises county office administration, school districts and SELPAs of financial implications of adopted budgets and projections for the purpose of facilitating communication and/or suggesting solutions to deal with financial challenges based on analysis of fiscal data.
- Facilitates and leads discussions related to program funding and expenditures for the purpose of providing advise on appropriate use of funding.
- Maintains a variety of fiscal information, files and records for the purpose of providing an up-to-date reference and audit trail for compliance.
- Meets and confer with administrators and program managers at school districts as needed for the purpose of providing direction, technical and procedural assistance on special education fiscal matters.
- Monitors and interprets school business legislation to communicate implications for the purpose of serving as an information source regarding fiscal procedures, policies, requirements and standards for Special Education in accordance with applicable law, regulations and policies and procedures and participating in the analysis of legislation disseminated by regulatory agencies.
- Prepares a wide variety of written materials and electronic financial information (e.g. financial/operating reports, budget for assigned program/s, proposals, contracts, etc.) for the purpose of documenting activities, providing reference, conveying information, and complying with established financial, legal and/or administrative requirements to Superintendents and SELPA governing boards.

- Processes a wide variety of program related financial information for the purpose of updating and distributing information, authorizing for action and/or complying with established accounting practices.
- Researches analyses and interprets complex financial and statistical data for the purpose of ensuring fiscal actions are in compliance with Education Code, regulations and court decisions.
- Reviews state, regional and administrative reports impacting school district funding and reimbursements owed for services for the purpose of providing district special education administrator with financial updates on the status and uses of specialized funding in accordance with established guidelines.
- Reviews, audits and authorizes Special education funding and administrative reports for the purpose of identifying potential budget variances, compiling statistical information, developing procedures, and conforming to established financial practices and regulatory requirements.
- Works with county office business officials for the purpose of completing fiscal review of Special Education programs; reviewing and approving requisitions, terms of contracts and other transactions initiated by administrative staff and program managers.

### **Other Functions**

- Performs other related duties as assigned by the SELPA Director for the purpose of ensuring the efficient and effective functioning of SELPA's.

### **Job Requirements: Minimum Qualifications**

#### **Knowledge and Abilities**

KNOWLEDGE is required to perform algebra and/or geometry; read technical information, compose a variety of documents, and/or facilitate group discussions; and solve practical problems. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: accounting, budgeting, financial analysis and research techniques as related to special education within school districts; applicable California and federal statutes, codes, laws, and regulations pertaining to special education funding.

ABILITY is required to schedule activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use basic, job-related equipment. Flexibility is required to work with others in a wide variety of circumstances; work with data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize specific, job-related equipment. Problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate. Specific ability based competencies required to satisfactorily perform the functions of the job include: adapting to changing work environment and/or priorities; being attentive to detail; meeting deadlines and schedules; and working under time constraints; analyzing issues and determining appropriate course of action; working as part of a team.

#### **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**

- Experience Four (4) years of professional level experience in accounting with broad exposure to budgeting and school district or school-related accounting. Experience in special education finance is highly desirable.
- Education A bachelor’s degree in accounting, finance, business or public administration, or closely related field.
- Equivalency A combination of education and experience equivalent to a bachelor’s degree in accounting, finance, business or public administration, or closely related field and four (4) years of professional level experience in accounting with broad exposure to budgeting and school district or school-related accounting. Experience in special education finance is highly desirable.

Required Testing

N/A

Certificates, Licenses, Credentials

Valid CA Driver’s License

Continuing Educ./Training

Clearances

- Criminal Justice Fingerprint/Background Clearance
- Physical Exam and drug test
- Tuberculosis Clearance

FLSA State: Exempt

Salary Grade: Classified Management, Grade 042

**Personnel Commission Approved: October 19, 2016**