

SANTA CLARA COUNTY OFFICE OF EDUCATION

CLASS TITLE: SELPA FINANCIAL ANALYST

BASIC FUNCTION:

Under the direction of the Director III-SELPA, administer, coordinate, and plan the development, allocation, and reporting of complex financial activities for the Special Education Local Planning Area (SELPA) program and County school districts; advise and serve as expert resource to SELPA and school district administrators on special education financial and business related matters.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Administer, coordinate, and plan the development, allocation, and reporting of complex financial activities for the Special Education Local Planning Area (SELPA) program and County school districts; prepare and deliver verbal and written fiscal updates for district Special Education directors and district CBOs.

Analyze CDE certifications, State budget assumptions, SELPA budget allocation plans, ADA reports, pupil counts and various revenue source reporting to plan, develop, prepare and update Special Education revenue projections for districts.

Calculate distribution of Special Education State Aid apportionments to districts; verify California Department of Education (CDE) certifications; update district Special Education revenue projections with State certifications and State budget projections; calculate monthly Special Education apportionments per State schedules; prepare request to distribute appropriate amount to each SELPA member district and County Office Special Education department.

Distribute Federal IDEA funds to districts and County Office programs; prepare spreadsheets to allocate and distribute IDEA SELPA level grants to individual districts and SCCOE for California Department of Education (CDE) grant letters and pupil counts; prepare and file federal IDEA expenditure reports with the CDE; collect related expenditure information from district programs.

Distribute County Office of Education (COE) Special Education property tax revenues to districts and COE programs; determine appropriate amount according to established guidelines; prepare and update SELPA allocation of Special Education Property Tax reports for CDE certifications.

Research, analyze, interpret, and assures County Office and district actions are in compliance with Education Code, laws, regulations, and court decisions; determine data needs for various financial reports; test validity of collected data; reconciles, Special Education reports, tax, and apportionment to state and county reports.

Calculate and set up accruals for Special Education State Aide and COE Special Education property tax transfers for district's year-end; calculate, balance, reconcile and perform Year-End closing entries and prepare related exhibits to districts.

Prepare, audit and file Special Education funding and administrative reports with the Department of Education and other regulatory agencies; prepare, distribute, and monitor budgets, revenue projections, and allocation plans and advise school districts of financial implications; disburse program specialist and low incidence equipment funds to districts.

Research, and analyze special education funding data, resolve problems, and develop worksheets and reports as needed; review special education certification documents; determine County Excess Tax distribution for the County Office and district programs.

Develop and implement short-term and long-term plans; provide data for long-term planning in division; participate in decisions that frequently have major impact across Office Branches and school districts.

Plan, direct and monitor special projects; confer with auditors; advise and answer financial questions for school districts related to Special Education funding; lead and facilitate discussions between districts related to Special Education funding.

Maintain current knowledge of laws, rules, regulations and policies related to special education finance; monitor school business legislation; interpret and analyze policies and regulations; direct and participate in the analysis of legislation and disseminates information on the impact of legislation; provide districts with periodic information regarding Special Education funding.

Establish and maintain a variety of correspondence, records, and files related to assigned activities; respond to telephone and email questions regarding SELPA fiscal questions; meet with administrators and program managers as needed to provide direction and technical and procedural assistance.

Develop complex spreadsheets for revenue projections; serves as information source regarding fiscal procedures, policies, requirements, and standards for Special Education.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Generally accepted accounting principles, generally accepted auditing standards and other advanced principles, techniques, and methods of governmental accounting, auditing, and budgeting.

Computer information systems operations, capabilities and applications relating to accounting, budget development, and financial management.

Financial and statistical research, analysis techniques and principles.

Recent developments, current literature, and sources of information regarding accounting and financial systems.

Pertinent federal, state, and local laws, codes, and regulations including those pertaining to educational financial record keeping and control activities.

Preparation of financial statements and comprehensive accounting reports.

Accounting, budget and business functions of an educational organization.

- Financial projection techniques.
- Financial and statistical record-keeping techniques.
- Modern office practices, procedures, methods, and equipment.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Oral and written communication skills.
- Interpersonal skills including tact, patience and courtesy.

ABILITY TO:

- Provide financial analysis and develop financial models based on historical and projected trends for educational organizations.
- Perform specialized and technical services requiring application and interpretation of data, facts, procedures and policies.
- Interpret, analyze, and apply laws, codes, regulations and court decisions affecting schools and special education.
- Provide functional and technical guidance in obtaining, preparing, sharing and exchanging data with outside agencies and administrative, technical, clerical personnel.
- Prepare clear and concise financial and accounting analysis reports.
- Interpret, apply and explain rules, regulations, policies and procedures.
- Operate a computer and assigned software to enter data, maintain records and generate reports.
- Evaluate and project annual income and expenditures to determine budget requirements.
- Maintain accurate financial and statistical records.
- Analyze financial data and prepare reports, forecasts and recommendations.
- Work independently with little direction.
- Meet schedules and time lines.
- Plan and organize work.
- Communicate effectively both orally and in writing.
- Prepare and deliver oral presentations.
- Establish and maintain cooperative and effective working relationships with others.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: bachelor's degree in accounting, finance, business administration or related field and three years accounting experience in an educational organization including work with budgetary and fiscal systems, models and procedures.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

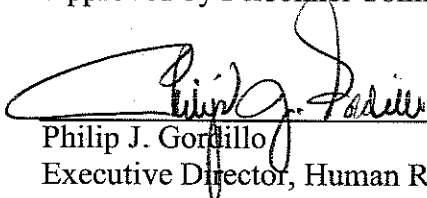
WORKING CONDITIONS:

ENVIRONMENT:
Office environment.

PHYSICAL DEMANDS:

- Dexterity of hands and fingers to operate a computer keyboard.
- Seeing to read a variety of materials.
- Hearing and speaking to exchange information.
- Bending at the waist, kneeling or crouching to retrieve and file materials.
- Sitting for extended periods of time.

Approved by Personnel Commission: June 23, 2011


 Philip J. Gordillo
 Executive Director, Human Resources

Date 7/03/11