

SANTA CLARA COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: DIRECTOR III - DISTRICT BUSINESS ADVISORY SERVICES

BASIC FUNCTION:

Under the direction of the Assistant Superintendent – Business Services, plans, organizes, controls, directs and provides fiscal oversight of school districts as mandated by the California Education Code; directs and supervises the preparation, monitoring, reviewing, auditing, and approval of fiscal and attendance transactions for school districts within Santa Clara County Office of Education; supervises and evaluates the performance of assigned personnel.

REPRESENTATIVE DUTIES:

The following duties are examples of assignments performed by incumbents in this classification. It is not a comprehensive list of duties, nor is it restrictive regarding job assignments.

ESSENTIAL DUTIES:

- Plans, organizes, controls, directs and provides fiscal oversight of school districts as mandated by the California Education Code; assures compliance with generally accepted accounting practices and applicable regulations and policies.
- Plans, directs, coordinates and supervises the preparation, monitoring, review, auditing, and approval of financial and attendance transactions, reports, and budgets.
- Monitors, audits and reviews district payroll-related services including contract payroll processing, payroll auditing, retirement processing, benefit plan administration, unemployment insurance administration, wage garnishment, and central records retention.
- Supervises and participates in the preparation of mandated cost claims for districts and Office; plans, directs, and coordinates the audit, approval, analysis, receipt, and distribution of major State and local revenues; conducts Special Education fiscal review; prepares revenue limits; coordinates departmental activities with other departments, school districts, offices of education, and agencies.
- Assists with the design, implementation, and review of district business systems; designs and implements new and revised systems to assure effective and efficient departmental operations; develops program evaluation criteria and standards.
- Directs and evaluates the performance of assigned staff; interviews and selects employees and recommends transfer, reassignment, termination and disciplinary actions; directs the development of training materials and the training of district staff; develops and implements, goals, objectives, policies, and priorities related to departmental activities.

- Provides technical advice, interpretation and coordination of direct fiscal management services to County school districts; interprets and provides guidelines, applicable regulations, and policy provisions; responds to concerns and requests for information, and provides solutions to related problems.
- Analyzes proposed and enacted legislation and provides advice and guidance; provides guidance on proper records management practices; represents SCCOE and school districts on appropriate local and State committees; conducts research, analyzes data, and makes recommendations on administrative, organizational, and operational problems, on the formulation of policies and procedures, and on staffing and organizational changes.
- Provides technical expertise, information and assistance to the Assistant Superintendent – Business Services regarding district business services and operations; assists in the formulation and development of policies, procedures and programs; recommends proper organization structure for assigned programs and functions; communicates with other administrators, school boards, personnel and outside organizations to coordinate activities and programs, resolves issues and conflicts and exchange information; assures proper communication with the County Superintendent regarding pertinent issues.
- Plans, organizes and implements long and short-term programs and activities designed to develop programs and services; participates in the formulation of divisional, organizational, and school district financial directions; forecasts trends and sets direction for Office and participate in planning for external agencies; recommend new or revised standards and policies.
- Reviews, interprets and communicates legislative laws, State Education Code, and other legal issues to school district administrators and staff, and County Office administrators.
- Directs the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities.
- Develops and prepares the annual preliminary budget for the Department; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations.
- Operates a computer and assigned software programs; operates other office equipment as assigned; drives a vehicle to conduct work as assigned.
- Attends and conduct a variety of meetings as assigned.

OTHER DUTIES:

- Perform related duties as assigned.

KNOWLEDGE, ABILITIES AND COMPETENCIES:

KNOWLEDGE OF:

- School district budgeting, accounting, reporting, auditing, and business procedures and

operations.

- Government Accounting Standards and Generally Accepted Accounting and Auditing Principles.
- California Education Code related to fiscal operations.
- Board policy and administrative regulations.
- State and federal timelines and processes.
- Budget preparation and control.
- Oral and written communication skills.
- Principles and practices of administration, supervision and training.
- Applicable laws, codes, regulations, policies and procedures related to a variety of financial areas.
- Current banking laws rules and regulations.
- Legal requirements of school districts related to budgeting and finance.
- Interpersonal skills using tact, patience and courtesy.
- Operation of a computer and assigned software.

ABILITY TO:

- Provide advice, support and oversight to county districts in areas related to budgeting, internal control procedures, payroll, accounting, legal issues and other finance-related matters.
- Communicate effectively both orally and in writing.
- Represent the County Superintendent to school districts.
- Interpret, apply and explain rules, regulations, policies and procedures.
- Interpret and maintain current knowledge of related legislation.
- Establish and maintain cooperative and effective working relationships with others.
- Operate a computer and assigned office equipment.
- Operate the financial software system and train others in the proper operations of the system.
- Analyze situations accurately and adopt an effective course of action.
- Meet schedules and timelines.
- Work independently with little direction.
- Plan and organize work.
- Prepare comprehensive narrative and statistical reports.
- Direct the maintenance of a variety of reports and files related to assigned activities.
- Budget preparation and control.
- Oral and written communication skills.
- Principles and practices of administration, supervision and training.
- Applicable laws, codes, regulations, policies and procedures.
- Interpersonal skills using tact, patience and courtesy.

LEADERSHIP TEAM COMPETENCIES:

- Develops and fosters effective individuals and teams.
- Operationalizes the organizational vision, mission, goals, shared values, and guiding principles.
- Demonstrates emotional intelligence.
- Models inclusive, effective, and authentic communication.

- Applies understanding of how identities and experiences influence access and opportunity to inform practices and decisions.
- Builds and sustains positive, trusting relationships.
- Conducts SCCOE operations with the highest moral, legal, and ethical principles.

EDUCATION AND EXPERIENCE:

Any combination equivalent to:

- Master's degree in accounting, finance, business or public administration or a related field and
- Five years increasingly responsible experience in school district auditing, budgeting and administration including at least three years in an administrative capacity.

LICENSES AND OTHER REQUIREMENTS:

- Valid California driver's license.

WORKING CONDITIONS:

ENVIRONMENT:

- Office environment.
- Driving a vehicle to conduct work.

PHYSICAL DEMANDS:

- Dexterity of hands and fingers to operate a computer keyboard.
- Seeing to read a variety of materials.
- Sitting for extended periods of time.
- Hearing and speaking to exchange information.

HAZARDS:

- Slipping, tripping, falling.
- Ergonomic injuries, repetitive motion injuries, eye strain.
- Indoor air pollution

HAZARDS

Disaster Service Worker

It is hereby declared that the protection of the health and safety and preservation of the lives and property of the people of the state from the effects of natural, manmade, or war-caused emergencies which result in conditions of disaster or in extreme peril to life, property, and resources is of paramount state importance requiring the responsible efforts of public and private agencies and individual citizens. In furtherance of the exercise of the police power of the state in protection of its citizens and resources, all public employees are hereby declared to be disaster service workers subject to such disaster service activities as may be assigned to them by their superiors or by law. *Ca. Gov. Code § 3100*

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Marisa Perry
Director III – HR / Classified Personnel Services

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