

**SANTA CLARA COUNTY OFFICE OF EDUCATION**  
**Personnel Commission**

**CLASS TITLE: FINANCIAL ADMINISTRATOR - CHARTER SCHOOLS**

**BASIC FUNCTION:**

Under the direction of the Director III – Charter Schools, coordinate and provide fiscal oversight to Santa Clara County Office of Education authorized charter schools; provide technical expertise and advisory services to charter schools, districts, county office administrators, and the Board on charter school financial matters; administer, prepare, review and analyze a wide variety of financial reports, including charter school petitions, monitoring reviews, revenue projections, budgets, and year-end closing reports; supervise and evaluate the performance of assigned staff.

**REPRESENTATIVE DUTIES:**

**ESSENTIAL DUTIES:**

Coordinate, plan and administer the fiscal oversight and monitoring activities for the SCCOE authorized charter schools to determine compliance with state statutes.

Review, analyze and evaluate charter school financial Local Control Accountability Plans (LCAPs) and reports, including monthly financial reports, budgets, interim reports, multi-year projections, and audit reports.

Research and analyze financial data; test validity of collected data and reconcile LCFE entitlements and apportionments to state reports; monitor monthly cash flow, determine adherence with generally accepted accounting practices, and identify fiscal solvency issues. Recommend corrective or administrative action, as necessary.

Provide technical expertise and advisory services to charter schools, districts, county office administrators, and the Board on financial matters relating to charter schools, including preparation of revenue projections and calculations, budgets, interim reports, attendance, and year-end reporting.

Prepare and present fiscal and technical information to charter schools, county office administrators, and the Board. Plan, implement or facilitate workshops for charter school administrators. Collaborate with county office administrators and legal counsel in preparation and review of staff analysis reports for charter school petitions and monitoring reports.

Communicate with managers, charter school personnel, districts, and outside organizations to exchange information and resolve issues and conflicts; document problems and recommend resolutions. Conduct site visitations, data collection and analysis for charter school petition reviews and monitoring reports.

Research, analyze, interpret and apply laws, regulations, and policies governing charter schools and provide guidance to schools, districts and county office administration. Prepare comprehensive and detailed reports to assist senior management and other policy makers in formulating decisions, and developing and implementing policies and procedures that impact charter schools.

Research and keep abreast of LCFF and LCAP regulations to ensure proper dissemination of information to other SCCOE staff and charters; provide guidance to charter schools in developing their LCAPs.

Prepare, revise and recommend policies and procedures as they relate to charter schools.

Research and analyze state reports that impact charter school funding to ensure that county office oversight billings comply with state statutes.

Supervise, train and evaluate the performance of assigned staff; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions.

Direct, approve, and assist staff in the development and delivery of in-service training programs on related areas.

Determine and manage workload priorities and adjust assignments to meet established timelines.

**OTHER DUTIES:**

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

Accounting, budgeting, financial analysis and research techniques as they apply to charter schools. Generally accepted accounting principles, generally accepted auditing standards, and other advanced techniques and methods of governmental accounting, auditing and budgeting.

Computer information system operations and applications relating to accounting, auditing, budgeting, and financial management.

Recent developments, current literature, and sources of information regarding accounting and charter school financial management.

Pertinent federal, state and local statutes and codes pertaining to educational finance.

Preparation of financial statements and comprehensive accounting reports.

Financial analysis and projection techniques.

Modern office practices, procedures, methods and equipment.

Best practices within the area of charter school finance.

**ABILITY TO:**

- Coordinate and provide fiscal oversight to SCCOE authorized Charter Schools.
- Design and prepare computer spreadsheets to analyze data.
- Perform financial and other statistical analysis.
- Interpret, explain and apply laws and regulations affecting charter schools.
- Provide financial analysis and develop financial models and trend projections based on current and historical data.
- Perform specialized and technical services requiring the application and interpretation of data, facts, procedures, and policies.
- Provide technical guidance to internal and external customers.
- Research and report on industry best practices.
- Prepare clear and concise financial and accounting analysis reports.
- Evaluate revenue and expenditures projections and forecasts to determine reasonableness.
- Work independently with minimum direction.
- Supervise, train and evaluate the performance of assigned staff.
- Plan and organize work to meet schedules and deadlines.
- Communicate effectively both orally and in writing. Prepare and deliver oral presentations.
- Establish and maintain cooperative and effective working relationships with others.
- Demonstrate highly developed and effective interpersonal skills.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: a bachelor's degree from an accredited college or university with major course work in accounting, business administration or a related field and three years of professional level, financial analysis experience. Work experience should include analyzing and evaluating various financial reports, such as financial statements and budget reports and making recommendations related to fiscal matters and services.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Indoor office environment. The incumbent in this position will be required to work hours beyond the normal workday and participate in meetings, conferences and professional development activities locally and outside the area; frequent driving of a car may also be required.

**PHYSICAL DEMANDS:**

- Hearing and speaking to exchange information in person and on the telephone
- Seeing to read, prepare and proofread documents, perform assigned duties
- Sitting or standing for extended periods of time
- Dexterity of hands and fingers to operate a computer keyboard and other office equipment
- Kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally as needed
- Lifting light objects

Approved by Personnel Commission: January 8, 2014  
Revised: March 11, 2015  
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Adriana E. Casas  
Supervisor, Classification & Recruitment  
Classified Personnel Services

*July 8, 2015*

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Date