

SANTA CLARA COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: MANAGER – CHARTER SCHOOLS OPERATIONS

BASIC FUNCTION:

Under the direction of an assigned administrator, coordinates and provides fiscal and operational oversight to Santa Clara County Office of Education authorized charter schools; provides technical expertise and advisory services to charter schools, districts, county office administrators, and the Board on charter school fiscal, operational, and compliance matters; administers, prepares, reviews and audits a wide variety of financial and oversight reports, including charter school petitions, renewals, material revisions and appeals, monitoring reviews, revenue projections, budgets, annual audits and year-end closing reports; supervise and evaluate the performance of assigned staff.

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:

- Coordinate, plan and administer the fiscal and operational oversight and monitoring activities for the SCCOE authorized charter schools to determine compliance with state statutes and Generally Accepted Accountability Principles (GAAP).
- Review, analyze and evaluate charter school financial Local Control Accountability Plans (LCAPs) and reports, including monthly financial rep
- orts, budgets, interim reports, multi-year projections, facility reports, attendance reports and audit reports unaligned with GAAP.
- Research and analyze financial and operational data; test validity of collected data and reconcile LCFF 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 fiscal and operational matters relating to charter schools, including review of audit reports, credit card and debit card receipts, attendance data, fiscal performance indicators, and operational procedures such as facilities management, insurance requirements, and cash handling practices.
- Prepare and present fiscal, operational and technical information to charter schools, county office administrators, and the Board. Plan, implement or facilitate workshops for charter school administrators and local, regional, and state authorities. Collaborate with county office

administrators and legal counsel in preparation and review of staff analysis reports for charter school petitions appeals, renewals 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.
- Attend Charter Board Meetings, Williams reviews, and appropriate operational facilities visits.
- Receive, review, and respond to issues, complaints, and concerns regarding charter schools; coordinate with appropriate county office staff, charter school personnel, districts, legal counsel, and community stakeholders to research matters, document findings, and recommend resolutions as appropriate.
- Develop, coordinate, and monitor plans, timelines, and activities for assigned special projects related to charter school oversight, fiscal and operational monitoring, reporting, and compliance requirements.
- Serve as a liaison among charter schools, county office staff, districts, local agencies, and community stakeholders; establish and maintain cooperative working relationships to support effective communication, coordination, and resolution of charter school matters.
- Research, analyze, interpret and apply laws, regulations, and policies governing charter schools and provide guidance to schools, districts and county office administration and other charter authorizers. 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 and revising their LCAPs and alignment with their budgets.
- Prepare, revise and recommend policies and procedures as they relate to charter schools, charter schools oversight and charter school authorization.
- Research and analyze state reports that impact charter school funding to ensure that county office oversight billings comply with state statutes.
- Develop, manage, invoice, and review fiscal oversight and billing practices; evaluate revenue and expenditure trends and assist with charter school department budget development, monitoring, and reporting processes.
- 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.

- Serve as designee for the Director of the Charter Schools Department, as assigned; represent the department in meetings, communications, and decision-making processes related to charter school fiscal and operational oversight.

OTHER DUTIES:

- Perform other duties as assigned.

KNOWLEDGE, ABILITIES AND COMPETENCIES:

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, financial management, school operations management, and operational management.
- Recent developments, current literature, and sources of information regarding accounting, charter school financial management, school operations, governance, liability, educational facilities and operations, and charter school operational management.
- School operations, charter school governance, liability considerations, and operational management practices related to charter school oversight and accountability.
- 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, operations, and school management.

ABILITY TO:

- Coordinate and provide fiscal and operational oversight to SCCOE authorized Charter Schools. Design and prepare computer spreadsheets to analyze data.
- Perform financial and operational analysis.
- Interpret, explain and apply laws and regulations affecting charter schools.
- Review charter petitions, renewals, revocations, and appeals.
- Monitor charter operations and performance.
- Provide financial analysis and develop financial models and operational analyses 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 and operational 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.

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:

- 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 experience analyzing and evaluating financial and operational information, making recommendations related to fiscal matters and services, and supporting oversight, monitoring, compliance, accountability, or related administrative activities, preferably in an educational or public sector setting.

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.

HAZARDS:

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

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*

Approved by Personnel Commission: January 8, 2014

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Marisa Perry

Director III – HR / Classified Personnel Services

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