



Leadership • Collaboration • Support

JOB TITLE: SELPA Fiscal Analyst

Classified Managers Salary Schedule, Range 11

DESCRIPTION OF BASIC FUNCTION AND RESPONSIBILITY

To study, analyze, plan and perform the fiscal procedures and functions of the Special Education Local Plan Area (SELPA), and prepare and present fiscal reports to the SELPA Superintendents' Council; to act in an advisory capacity to districts in special education funding; to communicate with state and county/local administrators; to organize and conduct meetings with district and county administrators relative to SELPA fiscal matters; to assist management information team with student data. Fiscal management for the SELPA office and SELPA wide grants, as well as monitoring data flows to the CDE. This job class requires knowledge of school accounting and budgeting procedures, familiarity with state and federal special education funding, and is responsible for exercising considerable independent judgment and decision-making skills.

JOB REQUIREMENTS AND QUALIFICATIONS

Education and Experience

Any combination of education and experience that would likely provide the required knowledge and abilities would be qualifying. A typical way to obtain the knowledge and abilities would be:

Education:

Formal or informal education or training which ensures the ability to read and write at a level necessary for successful job performance, supplemented by formal training in the principles, theory, and standard procedures of accounting in school district finance, is desirable.

Experience:

Increasingly responsible, technical accounting or auditing experience, preferably some experience in special education finance in a California public school district or county office of education, is highly desirable.

Knowledge of:

- Generally accepted accounting procedures and standards, including automated financial record keeping systems.
- Principles, practices, and techniques of fiscal and budgetary transactions, with particular references to special education accounting.
- Financial analysis and research techniques.
- Laws and regulations applying to special education accounting operations.
- State and federal special education funding sources.
- Data processing as it relates to financial record keeping.
- Data processing as it relates to student information record keeping.
- Basic office methods, practices, and procedures, including financial record keeping.
- Standard English usage, spelling, grammar, and punctuation.
- Standard office machines, including computers.
- Safe work practices.

Ability to:

- Respond promptly to requests of internal and external clients; provide needed information, assistance, training, materials, and resources.
- Plan, organize and prioritize your own work to meet deadlines and accomplish assigned tasks within established timelines including maintaining accurate records and files.
- Maintain an orderly work environment and perform tasks in prescribed and safe manner.
- Establish and maintain cooperative working relationships with those contacted during performance of job duties.
- Maintain and improve professional skills and knowledge.
- Be flexible and receptive to change.
- Understand and apply principles, techniques and procedures required for effective job performance.
- Apply the principles of governmental budgeting, auditing, and accounting.

- Comply with laws and regulations applying to school district accounting operations.
- Conduct financial analysis and other statistical research.
- Plan, implement and participate in the preparation of accounting reports.
- Accurately check, verify, and analyze a variety of accounting data and draw sound conclusions.
- Effectively train and work with others.
- Effectively communicate in both oral and written forms.

ESSENTIAL DUTIES

- Independently studies, plans, directs, and coordinates the development and implementation of systems and procedures used to collect data necessary in the financial control of special education funding.
- Completes required steps necessary to develop, audit and verify excess cost billing reports and procedures.
- Participates in governance committees to present and explain fiscal data, required reports, and budget information.
- Reviews data collected for consistency and accuracy in compliance with state and federal law.
- Facilitates and makes recommendations on the development of budget information and completes preparation of budgets for submission to decision-making groups.
- Prepares special education fiscal and budget reports, such as the J-50, for the State Department of Education, member districts and the governance committees.
- Certifies quarterly SMAA calendar and data.
- Prepares annual SMAA data collection fiscal requests and reports.
- Analyzes new legislation to determine the financial impact on special education income and communicates that impact as the primary fiscal advisor for the SELPA.
- Analyzes changes to current fiscal models within the SELPA to determine the financial impact upon the members of the SELPA.
- Calculates, summarizes, and distributes the allocation of Instructional Personnel Service Units to members of the SELPA.

- Assists in the design, modification or update of special education budgeting and accounting systems and procedures.
- Analyzes and reviews all funding sources in order to maximize revenues.
- Develops, implements, and supervises systems and procedures to ensure adequate budgetary and/or internal controls.
- Provides in-service training to district and/or County personnel regarding special education budgeting and finance.
- Performs related duties as assigned.

SUPERVISION RECEIVED

Employees in this classification reports directly to and receives supervision from the Assistant Superintendent, SELPA.

SUPERVISION EXERCISED

Employees in this classification are responsible for the overseeing and supervision of SELPA staff responsible for budgetary matters.

PHYSICAL ACTIVITY REQUIREMENTS

Work Position (Percentage of Time):

Standing (15%) Walking (15%) Sitting (70%)

Body Movement (Frequency):

None (0) Limited (1) Occasional (2) Frequent (3) Very Frequent (4)

Lifting – lbs. (0-40) Lifting (2) Bending (3)

Pushing and/or
Pulling Loads (1) Reaching
Overhead (2) Kneeling or
Squatting (3)

Climbing Stairs (2) Climbing Ladders (0)