



**Orange County Department of Education  
Human Resources Department  
Classified Management Class Specification**

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**Business Services Specialist**

**Class Code: 1131**

**Work Days: 225**

**GENERAL PURPOSE**

Perform a variety of complex, analytical, and technical advisory duties to assist Orange County Department of Education (OCDE) and local district staff related to fiscal oversight, financial accounting, and budgeting, and related areas; review and analyze school district budgets; provide technical assistance to school districts in preparing and monitoring annual budgets, fiscal reports and financial data; and provide assistance to higher level management staff.

**SUPERVISION RECEIVED AND EXERCISED**

1. Receives direction from the higher level management staff.
2. May provide technical and functional supervision over technical and clerical staff.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

1. Recommend and assist in the implementation of goals, objectives, and strategic plan; establish schedules and methods for providing specialized services; and implement policies and procedures.
  2. Act as liaison between the school districts and various public agencies.
  3. Assist in the preparation and/or review of budget and financial reports and prepare various complex state and federal reports and special reports to or from school districts related to revenue projections.
  4. Answer questions and provide information to management, staff, and school district personnel regarding related policies and procedures.
  5. Ensure compliance with California Department of Education and OCDE standards, policies, and procedures.
  6. Review and evaluate the fiscal impact of proposed collective bargaining agreements, reports, audits, nonvoter-approved debts, and other studies having fiscal implications.
  7. Provide guidance and consultation to local education agencies' regarding their Local Control and Accountability Plans (LCAP), the fiscal solvency review process, and the implementation of recommendations.
  8. Analyze and monitor school districts' current and multiyear financial projections to determine the accuracy and reasonableness of revenue projections, budget assumptions, sufficiency of required reserve levels and fund and cash balances, and related financial reporting information.
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9. Demonstrate attendance sufficient to complete the duties of the position as required.
  10. Perform related duties similar to the above in scope and function as required.

## **QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)**

### **Knowledge of:**

1. Principles and practices of accounting and budgeting.
2. Principles, methods, and practices of statistics and financial analysis.
3. Federal, state, and local laws, codes, and regulations affecting assigned work areas.
4. Procedures, methods, and techniques of project and workflow management and organization.
5. Business letter writing and basic report preparation.

### **Ability and Skill to:**

1. Compile, analyze, interpret, and report research findings.
2. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.
3. Effectively adapt and adjust program services to meet changing priorities and customer-specific needs.
4. Establish and maintain effective working relationships with various constituencies.
5. Understand, interpret, and explain laws, codes, contracts, policies, and procedures.
6. Develop and present training materials.
7. Prepare clear and concise correspondence, reports, and other written materials.
8. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
9. Communicate clearly and concisely, both orally and in writing, in English; and present information effectively in front of both large and small groups.

### **Education, Training, and Experience:**

A typical way of obtaining the knowledge, skills, and abilities outlined above is a bachelor's degree in accounting, finance, business, public administration, or a related field and four (4) years of finance, budgeting, accounting, or related experience; or an equivalent combination of training and experience.

## **PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class.

### **Physical Demands**

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification must be able to travel countywide to a variety of sites within a reasonable time frame, read written and electronic materials, and communicate clearly with

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those contacted through the course of work (typically in person, on the phone, and via email); perform deskwork for extended periods; and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces and move items weighing up to 25 pounds.

### **Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee typically works in an office environment that is moderately-paced with variable pressure.