



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

---

**Manager Accounting and Budget Support**

**Class Code: 1512**

**Work Days: 225**

**GENERAL PURPOSE**

Provide specialized services in support of accounting and budget programs for the Orange County Department of Education (OCDE); manage the development and implementation of budget programs; perform specialized accounting functions; and provide assistance to higher level management staff.

**SUPERVISION RECEIVED AND EXERCISED**

1. Receives direction from higher level management staff.
2. Exercises direct 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 budget and specialized services; and implement policies and procedures.
2. Provide staff assistance to higher level management staff on a variety of projects; research issues; compile and analyze data; develop reports; respond to requests for information; and make recommendations.
3. Serve as a liaison between higher level management and federal, state, and local agencies regarding all fiscal matters and provide guidance and direction for procedures and systems as fiscal needs change.
4. Prepare preliminary, tentative, interim, and final budget submissions for the state within established guidelines and review expenditures for programs to ensure proper budget compliance.
5. Develop budgets for individual funds and cost centers; estimate income for cost centers and programs using tax reports, certifications, estimates, and negotiations; and recommend improvements to the budget system as needed.
6. Project cash flow for determining budget transfer needs; review and process budget transfers; and add, change, or delete cost centers and individual accounts as needed.
7. Select, train, plan the work of, supervise, and evaluate staff; provide coaching to employees; collaborate on goal development; set clear expectations; provide constructive feedback; assist in improvement as needed; and check in regularly for understanding.
8. Review accounts and programs to ensure compatibility with state school accounting requirements and ensure all transactions follow the requirements and the designated categorical requirements.

- 
9. Serve as the lead for annual organizational audit and coordinate with programs to obtain all necessary documents that are audit-ready and in compliance.
  10. Prepare, analyze, forecast, and monitor revenue and expenditures for specialized programs.
  11. Prepare various financial reports of programs for OCDE executive cabinet review.
  12. Interpret legislation and make recommendations to higher level management staff.
  13. Work with all levels of OCDE staff to direct, assist, and explain the budget process as needed.
  14. Represent OCDE at various county, regional, and state meetings.
  15. Maintain records pertaining to programs and activities and compile reports and statistical information.
  16. Demonstrate attendance sufficient to complete the duties of the position as required.
  17. 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 complex finance administration in accounting, budgeting, and auditing.
2. Governmental Accounting Standards Board (GASB) and Generally Accepted Accounting Principles (GAAP).
3. Complex operations, services, and activities of a budgetary program.
4. Best practices, services, activities, and operations of a successful Fiscal Services Unit.
5. Principles of effective supervision, leadership, training, coaching, and performance evaluation.
6. Procedures, methods, and techniques of project and workflow management and organization.
7. Pertinent federal, state, and local laws, education codes, regulations, and standards/principles.

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

1. Select, train, lead, coach, direct the work of, supervise, and evaluate professional and technical employees; and effectively delegate authority and responsibility.
2. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas of responsibility.
3. Effectively adapt and adjust program services to meet changing priorities and customer-specific needs.
4. Translate financial goals into an appropriate budgeting system.
5. Analyze financial information and project income and expenditures.
6. Project the fiscal impact of impending legislation on the OCDE or its programs.
7. Devise and adapt procedures and systems to meet changing fiscal needs.
8. Establish and maintain effective working relationships with various constituencies.
9. Interpret and explain laws, codes, contracts, policies, and procedures.
10. Develop and present training materials.
11. Assess the performance of assigned areas, make recommendations for improvements and

---

developments when needed, and implement changes when appropriate.

12. Prepare clear and concise correspondence, reports, and other written materials.
13. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
14. 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 experience in fiscal management and accounting 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 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 essential functions.

Employee typically works in an office environment that is fast-paced with high pressure.