



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

Accounting and Budget Specialist, Fiscal Services

**Class Code: 1579
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; 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. Prepare preliminary, tentative, interim, and final budget submissions for the State within established guidelines; review expenditures for programs to ensure proper budget compliance.
4. Develop budgets for individual funds and cost centers; estimate income for cost centers and programs using tax reports, certifications, estimates, and negotiations; recommend improvements to the budget system as needed.
5. Project cash flow for determining budget transfer needs; review and process budget transfers; add, change, or delete cost centers and individual accounts as needed.
6. Review accounts and programs to ensure compatibility with State school accounting requirements.
7. Prepare various financial reports of programs for OCDE executive cabinet review.
8. Plan, prioritize, assign, supervise, and review the work of staff responsible for providing budget services.

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

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9. Interpret legislation and make recommendations to higher level management staff.
 10. Work with all levels of OCDE staff to direct, assist, and explain the budget process as needed.
 11. Represent OCDE at various county, regional, and state meetings.
 12. Maintain records pertaining to programs and activities; compile reports and statistical information.
 13. Select, train, supervise, and evaluate assigned personnel; work with employees to correct deficiencies.
 14. Provide coaching to employees; collaborate on goal development, set clear expectations, provide constructive feedback, and check in regularly for understanding.
 15. Demonstrate attendance sufficient to complete the duties of the position as required.
 16. 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. Complex operations, services, and activities of a budgetary program.
3. Best practices, services, activities, and operations of a successful Fiscal Services Unit.
4. Principles of effective supervision, leadership, training, coaching, and performance evaluation.
5. Procedures, methods, and techniques of project and workflow management and organization.
6. 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; effectively delegate authority and responsibility.
2. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned area of responsibility.
3. Translate financial goals into an appropriate budgeting system.
4. Analyze financial information and project income and expenditures.
5. Project the fiscal impact of impending legislation on the OCDE or its programs.
6. Devise and adapt procedures and systems to meet changing fiscal needs.
7. Establish and maintain effective working relationships with various constituencies.
8. Interpret and explain laws, codes, contracts, policies, and procedures.
9. Develop and present training materials.

Ability and Skill to (cont.):

10. Demonstrate a growth mindset and strive to assess performance of assigned area; make recommendations for improvements and developments when needed; and implement changes when appropriate.
11. Prepare clear and concise correspondence, reports, and other written materials.
12. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
13. Communicate clearly and concisely, both orally and in writing, in English; 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 from an accredited college or university with major course work in accounting, finance, business, public administration, or related field, and four years of increasingly responsible experience in fiscal management and accounting.

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, employees are regularly required to bend, stoop, push, pull, grasp, squat, twist, kneel, walk, sit, and reach to access materials or equipment and complete other tasks as assigned; lift and carry up to 25 pounds; and lift from ground, waist, chest, shoulder, and above shoulder level. The position may include occasional need to traverse uneven surfaces.

Employees in this classification are to be able to travel countywide to a variety of sites within a reasonable time frame; read written and electronic materials; communicate clearly in person, on the phone, and via email; and operate all required equipment.

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 fast paced with high pressure.

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