



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

Manager, Charter Schools Fiscal Oversight

**Class Code: 1523
Work Days: 225**

GENERAL PURPOSE

Manage, supervise, plan and coordinate fiscal oversight to Orange County Department of Education (OCDE) authorized charter schools; provide technical expertise and advisory services to charter schools, districts, county office administrators, and the OCDE Board of Education on charter school financial matters. Coordinate assigned activities with other units, divisions, outside agencies and the public; and provide highly responsible and complex staff assistance and information to higher level management staff.

SUPERVISION RECEIVED AND EXERCISED

1. Receives general direction from higher level management staff.
2. Exercises direct supervision over supervisory and professional staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work 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; implement policies and procedures.
 2. Coordinate, plan, and administer the fiscal oversight and monitoring activities for the authorized charter schools to determine compliance with state statutes and fiscal solvency.
 3. Participate in the development and implementation of goals, objectives, policies, and priorities for the Charter Schools Unit; identify resource needs; recommend and implement policies and procedures.
 4. Research and analyze financial data; test validity of data and reconcile entitlements and apportionment, identify fiscal solvency issues, and recommend corrective or administrative action.
 5. Review, analyze, and evaluate charter school financial Local Control Accountability Plans (LCAPs) and reports, budgets, and projections.
 6. Responsible for compiling financial analysis as it relates to various business partnerships, real property transactions and short or long term borrowing transactions.
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ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

7. Provide complex technical expertise and advisory services to charter schools, districts, county office staff, and the Board on financial matters relating to charter schools.
8. Prepare and present comprehensive fiscal and technical reports and information to charter schools, county office staff, and the Board; plan, implement, and facilitate trainings and workshops for charter school personnel.
9. Select, train, supervise, and evaluate assigned personnel; work with employees to correct deficiencies.
10. Provide coaching to employees; collaborate on goal development, set clear expectations, provide constructive feedback, and check in regularly for understanding.
11. Plan, prioritize, assign, supervise, and review the work of staff responsible for providing services within Charter Schools Unit; prepare work schedules for appropriate staff.
12. Collaborate with county office staff and legal counsel in preparation and review of charter school petitions and reports.
13. Communicate with county office staff, charter school personnel, districts, and outside organizations to exchange information and resolve issues and conflicts.
14. Conduct site visitations, data collection and analysis for charter school petition reviews and monitoring reports.
15. Research and analyze state reports that impact charter school funding to ensure compliance.
16. Identify opportunities for improving service delivery methods and procedures; review with appropriate management staff; implement improvements.
17. Demonstrate attendance sufficient to complete the duties of the position as required
18. Perform related duties and responsibilities as required.

QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)

Knowledge of:

1. Modern and complex principles and practices of financial analysis, accounting, and budgeting.
2. Principles of effective supervision, leadership, training, coaching, and performance evaluation.
3. Procedures, methods and techniques of budget analysis and preparation.
4. Principles and practices of mathematics and statistics.
5. Methods and techniques used in financial research and revenue forecasting.
6. California Education Code, Administrative Code, and the policies, rules, and regulations of the County Schools Office.
7. Pertinent federal, state, and local laws, codes, and regulations.
8. Procedures, methods, and techniques of project and workflow management and organization.

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 areas.
3. Analyze and interpret financial and accounting records.
4. Effectively oversee and participate in the fiscal oversight of authorized charter schools.
5. Assist charter schools in cash management.
6. Prepare complex financial statements, reports, and analyses.
7. Establish and maintain effective working relationships with various constituencies.
8. Understand, interpret, and explain laws, codes, contracts, policies, and procedures.
9. Develop and present training materials.
10. Prepare clear and concise correspondence, reports, and other written materials.
11. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
12. 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 Master's degree from an accredited college or university with major course work in accounting, finance, or business administration or a related field, and four years of responsible finance 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. 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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