

# MONTEREY COUNTY OFFICE OF EDUCATION

## SENIOR DIRECTOR, DISTRICT ADVISORY SERVICES FINANCE AND BUSINESS SERVICES

**CLASSIFICATION:** Classified Management  
**SALARY LEVEL:** 81  
**WORK YEAR:** 227

### **DEFINITION:**

Under the direction of the Senior Executive Director of Finance the Senior Director of District Advisory Services (DAS) is responsible for ensuring that the Monterey County Office of Education (MCOE) provides oversight, advisory, and financial services to the school districts and other clients within the county, specifically in the area of state and federal compliance, budgetary best practices and key financial concepts necessary to support district and agency goals and objectives.

### **SUPERVISOR:**

Senior Executive Director of Finance

### **POSITION(S) SUPERVISED:**

Classified staff assigned

### **QUALIFICATION REQUIREMENTS:**

To perform a job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed in the job description are representative of the knowledge, skills, and/or abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**MAJOR DUTIES AND RESPONSIBILITIES:** The following is a list of duties that is representative of the position that includes but is not limited to:

- Develop the DAS department as an effective section of the Finance and Business Services Division including, but not limited to, the development of policy and procedures, supervision, training and evaluation of staff
- Administer the operations of the department
- Establish goals, priorities and systems for District Advisory Services
- Direct the implementation of State mandated AB 1200 and AB 2756 issues, including the review of annual budgets, interim reports, unaudited actuals, local property taxes, public disclosure of collective bargaining, and debt issuance
- Calculate the Local Control Funding Formula (LCFF) allocation for districts; support districts in using the LCFF calculator; and the Minimum Proportionality Percentage (MPP) calculation
- Work with other managers, internally and externally, to develop complex budgets, difficult budget calculations, fees for service agreements, and other complex business decisions
- Evaluate effectiveness of department operations
- Assist in the budget development for the organization
- Serve as intermediate agent and district advocate with the California Department of Education

- Provide training to district personnel on pertinent changes in education code, rules and regulations affecting school finance and business operations
- Monitor internal and external controls with authority to modify processes
- Serve on various committees on behalf of the county office
- Stay current on changes in auditing, accounting, financial reporting, and state and federal legislative issues that affect school districts
- Develop strategies to resolve complex administrative, fiscal, and operational issues
- Supervise the reporting of county-wide 1099-MISC forms annually
- Assist and collaborate with other managers and divisions in understanding information in the district Local Control Accountability Plans (LCAPs)
- Work with managers and districts to annually review and approve district LCAPs
- Assist and collaborate with staff in the design and provision of customized LCAP support sessions as needed to meet unique district needs
- Support districts in their data review, annual update and LCAP development process
- Review and validate data input into the California Longitudinal Pupil Achievement Data System (CALPADS) system for purposes of ensuring data reporting accuracy
- Supervise the auditing of school district warrants for available cash and legality of expenses
- Effectively supervise, train, and evaluate the work and performance of staff
- Review, interpret, and implement changes and/or modifications in programs, procedures and operations
- Advise management staff on selected aspects of Business Services
- Develop and implement DAS policies and procedures for cost effective business services practices
- Advise school districts in the preparation and review of State and Federal reports, including interpreting regulations and implementing changes in school finance
- Develop and interpret statistical and financial information for school districts
- Follow up with school districts in response to independent auditor's findings
- Coordinate review of school district reorganization and boundary proposals
- Conduct training for school districts and MCOE personnel in budget and business issues
- Review, recommend approval or certification, and file financial reports with the California Department of Education, State Controller's Office, and federal agencies for the county office, and other educational agencies within Monterey County
- Participate in the fiscal oversight of financially troubled school districts
- Plan, coordinate and analyze contractual requirements
- Advise district and/or internal management staff on budgeting, accounting, and auditing policies and procedures
- Effectively communicate, Interpret and disseminate information regarding State and Federal laws and regulations affecting the accounting operations of the county office and school districts
- Participate in the development and implementation of new or improved data processing systems and data processing procedures

**OTHER DUTIES:**

Performs other job-related duties as required

**PHYSICAL AND MENTAL CHARACTERISTICS:**

Physical, mental and emotional stamina to perform the duties and responsibilities of the position; manual dexterity sufficient to write, use the telephone and business machines; vision sufficient to read printed

materials; hearing sufficient to conduct in person and telephone conversations; speaking ability in an understandable voice with sufficient volume to be heard in normal conversational distance, on the telephone and addressing groups; physical agility to push/pull, squat, twist, turn, bend, stoop and to reach overhead; physical mobility sufficient to move about the work environment (office, district, school site-to-site), drive an automobile and respond to emergency situations; physical strength sufficient to lift 25 pounds; physical stamina sufficient to sit for prolonged periods of time; mental acuity to collect and interpret data, evaluate, reason, define problems, establish facts, draw valid conclusions, make valid judgments and decisions.

## **REQUIRED QUALIFICATIONS:**

### **Education and Experience:**

- Bachelor's degree in Business Administration Business Management, Accounting, or a related field from an accredited college or university
- Five (5) years experience and demonstrated competency in the development, implementation, and monitoring a fiscal operation and budgeting processes in a financial institution/agency (with at least three of these years professional experience in a County Office of Education or California school district)
- Three (3) years supervisory experience

### **Knowledge of:**

- AB1200 and AB2756 related to County Office of Education responsibilities
- Local Control Funding Formula (LCFF) and Local Control Accountability Plan (LCAP)
- School and/or district budget development and monitoring
- School accounting principles
- Standardized account code structure (SACS)
- California laws and regulations affecting school business and finances
- Advanced principles and practices of governmental accounting and auditing
- Principles and practices of systems design
- Integrated financial accounting systems
- California Education Code, laws, rules, and regulations as related to fiscal operations of public agencies; principles of management analysis and organizational design
- Management and administrative theory and practices
- Personnel administration

### **Skills and Abilities:**

- Lead, manage, and administer an organizational team that ensures oversight, advisory, and financial services to many school districts and clients effectively
- Multi-tasking at a senior level in an effective manner to accomplish the responsibilities of the department
- Establish procedures and priorities
- Ensure deadlines are met
- Review school and/or district budgetary and accounting transactions
- Evaluate and implement processes
- Intermediate to advanced use of Excel and other MS Office applications

- Establish individual and work unit objectives in alignment with long range organizational goals
- Detailed orientated in order to ensure accuracy and high quality work within the DAFS section
- Problem solve, recommend and apply solutions
- Apply deductive and inductive reasoning and logic to draw conclusions and provide summaries and recommendations
- Establish and maintain effective working relationships with others
- Develop and deliver comprehensive, clear, and concise written reports and oral presentations
- Communicate effectively both orally and in writing
- Model communication and interaction that respects and includes all individuals and their languages, abilities, religions, and cultures
- Train, evaluate and direct personnel
- Analyze, interpret and apply laws and regulations
- Develop complex excel spreadsheets that are formula driven
- Establish and manage department priorities, processes, and procedures
- Establish and maintain appropriate project deadlines
- Advanced computer skills

**Licenses and Certifications:**

- California Driver's License with evidence of insurability

Approved 03.01.16 ~~Approved by:~~

Assistant Superintendent of Human Resources  
or designee

Date Approved: