

SPECIAL EDUCATION FISCAL ANALYST

DEFINITION

Assists an administrator by conducting complex operational analysis and reviewing, monitoring, and reporting various fiscal aspects related to Special Education.

TYPICAL DUTIES

Performs the following duties regarding various LAUSD Special Education operated programs:

- Plans the annual operational activities, consisting of annual centralized budgeting, resource allocation, and year-end expenditure distributions for Special Education.
- Prepares and analyzes long-term financial and statistical revenues, expenditure projections, budget alignment, and consolidated expenditure forecasts and trend analysis to review and analyze the budget.
- Analyzes federal and State legislations, Education Codes, Mandated Consent Decrees, and fiscal regulations as it relates to special education to determine fiscal implications, appropriate use of funds, and revenue maximization.
- Reviews and analyzes the budget, policies, and programs to gain operational improvements, cost savings, establish priority on allocation of funds, and alignment of budget.
- Analyzes the fiscal impact of various Special Education policy proposals and assists in the preparation of status reports to the Board of Education with recommendations.
- Develops and maintains policies and procedures, methodologies, and processes to collect data.
- Manages processing and tracking of financial transactions, files, and records.
- Conducts research studies, ad hoc analysis, scenarios, and prepare reports regarding policies, procedures, organization structure, and other administrative, budgeting, and financial analysis needs for overall problem solving.
- Performs complex analysis independently and identifies and informs administration of potential financial impact, opportunities, and recommendation in areas, such as NPS, NPA, Per Diem, Reimbursements, and Fee For Service.
- Delivers presentations for Special Education related items such as reporting requirements, Charter Options, revenue allocation models, expenditure trends, and Special Ed funding sources.
- Analyzes and reviews data from Welligent IEP system, MiSiS, CALPADS, SAP, and COFE.
- Develops and maintains data consolidation for federal and state reporting.
- Performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Special Education Fiscal Analyst serves as a specialist related to financial data, analysis, and projections related to Special Education-operated programs.

A Fiscal Services Manager supervises and participates in budget preparation and modification, expenditure analysis, and budget adjustment for schools, administrative regions, programs, or the District.

A Principal Financial Analyst serves as a specialist in financial matters and procedures related to proposal and budget preparation and modification, expenditure analysis, position control, and income forecasting for special or regular programs.

SUPERVISION

General direction is received from an Assistant Budget Director, or higher-level administrative staff. Supervision may be exercised over financial staff or clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Federal and state legislation, fiscal regulations, guidelines, compliance, budgeting, policies and procedures as it relates to special education
- Modified Consent Decree historical fiscal implications
- Accounting theory, practices, procedures, and statistical analysis
- Budgetary and cost analysis practices, procedures, and techniques.
- District specific software such as Welligent, MiSiS, CALPADS, SAP, and COFE
- Microsoft Office

Ability to:

- Analyze and interpret regulations, laws, policies, and rules
- Devise a variety of methods, procedures, and systems to resolve budget, financial, and administrative problems
- Analyze cost information, present reports to management for executive decision making, and make recommendations
- Communicate clearly and concisely, both orally and in writing
- Work collaboratively with all levels of District personnel and external agencies
- Work independently with minimal direction
- Manage multiple tasks with effective time management skills

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university preferably with a bachelor's degree in accounting, finance, public or business administration, economics, or a related field. Professional experience in finance, budgeting, or a related field beyond that required, may be substituted for up to two years of the required education on a year-for-year basis, provided that the requirement of a high school diploma or equivalent is met.

Experience:

Five years of professional-level experience in financial analysis, budgeting, cost accounting and/or auditing, including analysis of income and expenditure statements, budgets, or cash flow. Experience with Welligent, MiSiS, CALPADS, SAP, and COFE is preferable.

Special:

A valid driver's license to legally operate a motor vehicle in the State of California and the availability of private transportation, or the ability to utilize an alternative method of transportation.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.

Revised
11-03-2022
MJM