

SENIOR FISCAL SPECIALIST

DEFINITION

Plans the operational and administrative activities relating to complex school fiscal management for the Budget Services and Financial Planning Division, and monitors budgetary changes for conformance to policies and procedures. Coordinates, supervises, and trains the school Fiscal Specialists located at the Local Districts.

TYPICAL DUTIES

- Supervises, coordinates, and organizes activities concerning complex fiscal and operational tasks related to school fiscal management.
- Conducts complex studies in the areas of budget, financial management, expenditure analysis, and forecast analysis.
- Monitors budgetary changes and ensures application of and adherence to existing budgetary/financial policies, procedures, and guidelines.
- Analyzes and reviews school budgets to ensure compliance with guidelines developed by the California Department of Education and the State Controller's Office.
- Prepares a variety of special reports and high-level analysis, including projections of budget and expenditures for use in managing fiscal resources at school sites.
- Provides high-level analysis and monitoring of school-site budgets to identify deficits and prevent overdrafts.
- Provides fiscal and operational support to school administrators in achieving the goals and performance framework targets in the schools' academic plan and educational programs.
- Interprets federal, State, and District program and fiscal guidelines to administrators, school-based staff, community groups, and the public.
- Provides fiscal management, budget policy, and data systems training to Fiscal Specialists, clerical staff, principals, coordinators, instructional staff, central office staff, and parents, using training materials and language appropriate to each audience and stakeholder group.
- Presents reports regarding budgets, as well as current and anticipated financial conditions to school and central office administrators.
- Reviews and recommends modifications or updates to a variety of rules, policies, and procedures in order to establish and maintain financial controls.
- Confers with District personnel, community groups, and others to obtain or impart information relating to financial and administrative operations and to explain procedures and regulations.
- Assists fiscal staff at the Local Districts and responds to inquiries.
- Performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Senior Fiscal Specialist supervises Fiscal Specialists and plans the operational and administrative activities relating to school fiscal management for the School Fiscal Services Branch of the Budget Services and Financial Planning Division.

A Fiscal Specialist provides budgetary and financial services to school and Local District staffs.

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

branches, divisions, Local Districts, or the District, or conducts oversight visits and review of charter schools.

SUPERVISION

General direction is received from an Assistant Budget Director or Deputy Budget Director. Supervision is exercised over Fiscal Specialists, other financial staff, or clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Financial practices, procedures, and methodologies used at the school and/or program levels
- Principles of budgetary practices and procedures
- Applicable rules and regulations relating to the General Fund's regular and specially-funded programs
- Data systems applications used for budget and financial management such as SAP-SFE and SAP-COFE
- Microsoft Word, Access, and advanced Excel including lookup functions and pivot tables

Ability to:

- Communicate verbally and in writing in a clear and concise manner
- Analyze and apply policies and procedures to resolve budgetary problems
- Work collaboratively with all levels of District personnel and the public
- Deliver effective oral presentations to various types of audience
- Supervise staff effectively
- Understand District organizational units and functions

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university including the completion of 12 semester units or the equivalent quarter units in college-level accounting, finance, or mathematics, preferably with a bachelor's degree in accounting, finance, public or business administration, economics, or a related field. Professional-level 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 and the completion of 12 semester units or the equivalent quarter units in college-level accounting, finance, or mathematics is met.

Experience:

Four years of experience as a Fiscal Specialist or a Financial Analyst with LAUSD or four years of professional-level analytical experience; including at least two years of experience involving financial analysis, preferably with District-level, program-level, or school-level budgets.

Special:

A valid California Driver License and the availability of private transportation, or the ability to use an alternative method of transportation.

This 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 relevant law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition is reasonably related to existing duties.

Revised
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