



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

Business Services Specialist

**Class Code: 1131
Work Days: 225**

GENERAL PURPOSE

Perform a variety of complex, analytical, and technical duties to assist OCDE and local district staff in the implementation and maintenance of business services support for financial reporting and oversight, financial systems software, and related areas, and provide assistance to higher level management staff.

SUPERVISION RECEIVED AND EXERCISED

1. Receives direction from the higher level management staff.
2. Exercises technical and functional supervision over technical and clerical 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. Confer with staff from various districts and OCDE departments to solve financial reporting application problems; coordinate related activities with districts and OCDE staff; identify district and OCDE needs and assist in resolution.
 3. Assist in the planning and implementation of financial reporting applications; develop accurate time frames for assigned projects, and follow-up to ensure compliance.
 4. Act as liaison between the school districts and various public agencies.
 5. Assist in the preparation and/or review of budget and financial reports. Prepare various complex state and federal reports, and special reports to or from school districts related to revenue projections.
 6. Answer questions and provide information to management, staff, and school district personnel regarding related policies and procedures.
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ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

7. Prepare documentation for new procedures and changes in existing procedures in conjunction with districts; ensure compliance with California Department of Education and OCDE standards, policies, and procedures.
8. Manage all phases of assigned projects; assist other staff with special projects as directed.
9. Demonstrate attendance sufficient to complete the duties of the position as required.
10. 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 accounting and budgeting.
2. Principles, methods, and practices of statistics and financial analysis.
3. Federal, state, and local laws, codes, and regulations affecting assigned work areas.
4. Operation and application of automated systems relative to business and statistical use.
5. Business letter writing and basic report preparation.
6. Select, train, lead, coach, direct the work of, supervise, and evaluate technical and clerical employees; effectively delegate authority and responsibility.

Ability and Skill to:

1. Compile, analyze, interpret, and report research findings.
2. Effectively manage projects to include the maintenance of schedules and coordination of all phases of assigned projects.
3. Establish and maintain effective working relationships with various constituencies.
4. Understand, interpret, and explain laws, codes, contracts, policies, and procedures.
5. Develop and present training materials.
6. Prepare clear and concise correspondence, reports, and other written materials.

Education, Training and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is Bachelor's degree from an accredited college or university with major course work in accounting, finance, business, public administration, or a related field, and four years of responsible finance, budgeting, accounting, or related 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 moderately paced with variable pressure.

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