



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

**Class Code: 3043  
Date Adopted: July 1, 2008**

**FLSA Status: Nonexempt  
Union Representation: Represented**

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**Apportionment Technician**

**GENERAL PURPOSE**

Under direction, performs specialized complex accounting and technical support functions that provide OCDE and school district management state and federal reports and provides technical support and assistance to school districts in completion of attendance and other reports; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Apportionment Technicians are responsible for the collection, analysis, reconciliation, and verification of statistical data used to monitor attendance of County school districts and ensure full state funding for Average Daily Attendance (ADA) to which they are entitled. Incumbents are also responsible for development of various mandated statistical reports throughout the fiscal year, used for reporting to the OCDE board, school district governing boards, and the California Department of Education. Incumbents may also serve as a lead and/or major resource to others on assigned projects.

Apportionment Technician is distinguished from District Financial Specialist in that incumbents in the latter class perform complex financial accounting duties and analyses of significant impact on County school districts.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.*

1. Provides technical assistance and advice to school districts and county office regarding attendance reporting functions; monitors timelines, verifies accuracy of calculations and figures, and submits statistical data to California Department of Education as needed; provides periodic reports to OCDE and school district administration.
2. Acts as liaison between County school districts and OCDE regarding designated specialized reporting procedures, policies, and guidelines.
3. Tracks, records, and assists with the forecasting of future ADA data for OCDE programs; audits school district data for accuracy and identifies and resolves discrepancies; develops comprehensive reports related to school district ADA and enrollment; submits ADA reports and projections to OCDE management and the California Department of Education; performs analyses, researches causes for changes in ADA levels and projections, and prepares reports, charts, and graphs for review.
4. Collects, compiles, organizes, and distributes school district data relating to race, ethnicity, grade level, gender, and dropout and graduation rates for all districts; prepares surveys and reports to media outlets and the general public.

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### **ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)**

5. Identifies problems and interacts with internal and/or external contacts as required to correct errors or discrepancies in school district data and statistical reports.
6. Acts as a major information resource for school districts, California Department of Education, federal agencies, media, and the general public regarding assigned areas of responsibility.
7. Supports districts in the completion of attendance reports; aids districts in updating software and files periodically released by the California Department of Education.

### **OTHER DUTIES**

1. Develops and maintains a scanned database of attendance reports.
2. Converts various reports to PDF format and creates searchable databases for posting on OCDE's website.
3. Attend a variety of meetings, training sessions, and conferences as required.
4. Performs other technical and administrative support or specialized accounting functions as needed.
5. Performs special projects as assigned.

### **QUALIFICATIONS**

#### **Knowledge of:**

1. Financial/statistical/comparative analysis techniques and formulae.
2. Generally accepted accounting principles and standards and state accounting standards, procedures, codes and software for school districts.
3. Laws, regulations, rules, and codes applicable to the financial administration of a school district.
4. Principles and practices of sound business communication.

#### **Ability to:**

1. Operate a computer using word processing, spreadsheet and other business software.
2. Accurately compile, post, verify, and maintain computerized statistical data, files, and reports.
3. Collect, obtain, evaluate, and interpret technical and specialized statistical and financial information correctly and explain information accurately and precisely to internal and external customers.
4. Exercise sound independent judgment within areas of responsibility.
5. Organize and maintain specialized files and documentation.
6. Communicate clearly and effectively, orally and in writing.
7. Prepare clear, concise, and accurate reports, correspondence, and other written materials.
8. Maintain confidentiality of documents and records.
9. Establish and maintain effective working relationships with OCDE and district management, staff, external agencies, and others encountered in the course of work.

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**Ability to: (cont.)**

10. Demonstrate attendance sufficient to complete the duties of the position as required.

**Education, Training, and Experience:**

A typical way of obtaining the knowledge and skills outlined above is graduation from an accredited college or university with major coursework in accounting, finance, public administration, or a related field; and two years of progressively responsible professional experience in fiscal and/or statistical analysis and reporting; or an equivalent combination of training and experience. Experience in an educational institution is preferred.

**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 sit, walk, and stand; talk or hear, both in person and by telephone; use hands repetitively to finger, handle, feel, or operate computers and standard office equipment; reach with hands and arms from the waist to at or above shoulder level; bend, stoop, push, pull, grasp, squat, kneel, and twist to open file cabinet drawers, and lift up to 25 pounds from ground, waist, and chest level. Travel over uneven terrain that may include gravel or dirt; carry materials on stairs; some locations may have stairs and will not have elevators.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve problems; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks; work with frequent interruptions; and interact with OCDE and district management, staff, external agencies and others 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. Employees work under typical office conditions and the noise level is usually quiet.