SAN MATEO COUNTY OFFICE OF EDUCATION CLASS

TITLE: PROGRAM COMPLIANCE ANALYST

BASIC FUNCTION:

Under the direction the Executive Director, SELPA, perform a variety of functions related to establishing, analyzing, monitoring and maintaining manual and automated financial records for the Special Education Local Plan Area (SELPA) programs and school districts to ensure compliance with program regulations, rules, policies and applicable laws; review and analyze designated budgets, funds and accounts; advises and serves as expert resource to SELPA and school district administrators on special education funding compliance and related matters.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:
Analyze, assist in the preparation, monitor and maintain the SELPA budget to ensure compliance with program guidelines and regulations; ensure that SELPA funding complies with applicable rules, regulations, policies, procedures and laws; review, monitor and recommend special education funding compliance protocols and policies to meet regulatory standards

Gather, research and analyze special education funding data; input a wide variety of financial and statistical data into an assigned computer system; establish and maintain automated records and files; initiate queries, manipulate data, and develop fiscal/budget spreadsheets for revenue projections to distribute to school districts as appropriate; ensure accuracy of input and output data

Develop and conduct professional training for member LEAs and other applicable stakeholders on special education program funding, monitoring, and compliance with relevant federal and state requirements; act as the primary point of contact and subject matter expert for SELPA member LEAs (Local Educational Agencies) on compliance and technical budget related matters

Assist in developing and executing work plans and protocols to conduct fiscal and internal control reviews and assessments for compliance purposes; serve as a liaison to various agencies (e.g. County Office committees, interagency boards) for the purpose of explaining compliance procedures, and conveying and/or receiving information related to special education program funding

Provide consultation to administrators and school district personnel concerning special education funding; respond to inquiries and serve as informational resource to provide technical information and advice concerning special education accounts, budgets, standards, practices, transactions, records, reports, requirements, laws, codes, regulations, policies and procedures; confer with county and state auditors to provide required information and documents as appropriate and in accordance with established timelines

Personnel Commission Approval: June 14, 2023
San Mateo County Office of Education
Attend SELPA Governing Board meetings and other SELPA fiscal meetings, as appropriate; serve as fiscal and technical resource to the SELPA Governing Board and provide information, analysis and advice as requested

Prepare and file special education funding and administrative reports with the California Department of Education and other applicable regulatory agencies; prepare and maintain financial reports related to SELPA including, but not limited to, the Local Plan – Annual Budget Plan and Annual Service Plan, Maintenance of

Effort documents, and federal grant expenditures reports; review various special education documents from LEAs such as comprehensive coordinated early intervening services (CCEIS) reports to ensure accuracy, completeness and compliance with established guidelines

Collaborate with County Office Business Services relative to disbursement of County Office excess tax distribution and other fiscal matters as appropriate; assist in the preparation, development and revision of designated budgets as assigned; forecast revenue and expenditures; analyze budgetary data and provide input to administrators and school districts concerning budgetary matters

Develop and conduct professional development training to member LEAs and other applicable stakeholders on special education program funding, monitoring, and compliance with relevant federal and state requirements; serve as a resource and subject matter expert to member district personnel to provide guidance and information related to special education funding; serve as a liaison to various agencies (e.g. district committees, interagency boards) for the purpose of explaining compliance procedures, and conveying and/or receiving information related to special education program funding

Communicate with administrators, personnel and various outside organizations to exchange information, coordinate activities and programs and resolve issues or concerns

Operate a variety of office equipment including a calculator, copier, fax machine, computer and assigned software

Attend and participate in various meetings and workshops as assigned

OTHER DUTIES:
Perform related duties as assigned

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:
Federal and state regulations, laws, and policies related to Special Education funding
Principles, methods and techniques of effective training programs
Budget and regulatory compliance protocols and procedures

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Budget development and preparation methods and procedures
Mandated federal and state Special Education reporting
Various administrative financial reports related to the SELPA Local Plan, the Annual Budget Plan, Annual Service Plan and other Special Education administrative reports
Fiscal assessment, monitoring and control techniques and methods
Policies and objectives of Special Education programs and activities
Record retrieval and storage systems
Research and statistical evaluation techniques
Operation of a computer and assigned software
Effective oral and written communication skills
Effective methods and techniques for presenting information

ABILITY TO:
Review, monitor and recommend Special Education funding compliance protocols and policies
Serve as liaison between the San Mateo County Office SELPA and various agencies
Attend SELPA Governing Board meetings and serve as technical resource and advisor in compliance special education funding and compliance matters
Prepare, audit and file a variety of mandated state and federal Special Education administrative reports
Develop and conduct effective professional training programs
Develop and conduct professional and effective presentations for various SELPA Board meetings and other relevant occasions
Prepare and analyze comprehensive financial and statistical reports
Utilize a computer to input data, maintain automated records, initiate queries and generate a variety of statistical and financial data reports
Communicate effectively both orally and in writing
Interpret, apply and explain rules, regulations, policies and procedures
Establish and maintain cooperative and effective working relationships with others
Determine appropriate action within clearly defined guidelines
Plan and organize work to meet schedules and time lines
Analyze financial data, prepare reports, and provide consultation to LEA Special Education administration
Operate standard office equipment including a computer and assigned software

EDUCATION AND EXPERIENCE:

Any combination and/or experience equivalent to:
A bachelor’s degree in business, accounting or related field and three years’ experience with varied responsibilities in program fund auditing, compliance, control and record-keeping, including experience with financial report preparation
WORKING CONDITIONS:

ENVIRONMENT:
A person in this classification will work in an office environment, with controlled temperature conditions and no direct exposure to hazardous physical substances. An employee in this job class may interact with staff and members of the public under emotionally stressful conditions while interpreting and enforcing division rules and policies.

PHYSICAL DEMANDS OF THE JOB:
Hearing and speaking to make presentations and exchange information
Dexterity of hands and fingers to manipulate a computer keyboard and other office equipment
Seeing to read a variety of materials
Sit and stand for extended periods of time
Bending, stooping, kneeling and reaching to perform assigned duties
Pushing and pulling to access documents and materials in file drawers and cabinets
Reasonable accommodations will be made for individuals on a case by case basis