

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. FINSPL2D24N

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.

2. Employee's Name (Last, First, M.I.)	8. Department/Agency EDUCATION
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission)
4. Civil Service Position Code Description Financial Specialist-2	10. Division Educator Excellence, Career Technical Education, Special Education, and Administrative Law
5. Working Title (What the agency calls the position) IDEA Part B Special Education Fiscal Specialist	11. Section Office of Special Education (OSE)
6. Name and Position Code Description of Direct Supervisor ANDREJACK, JOHN A; FINANCIAL MANAGER-4	12. Unit Program Finance
7. Name and Position Code Description of Second Level Supervisor MCINTYRE, REBECCA A; STATE ADMINISTRATIVE MANAGER-1-FZN	13. Work Location (City and Address)/Hours of Work 608 W. Allegan, Lansing MI 48933 / 8:00am–5:00pm M-F, hybrid and remote work schedule

14. General Summary of Function/Purpose of Position

This position serves as the sole Individuals with Disabilities Education Act (IDEA) Part B financial specialist overseeing and ensuring all special education program fiscal requirements are met for \$487,000,000. This position serves as the agency expert and liaison to advise and support the office, the Program Finance Unit, the department other state agencies, all school districts, stakeholders, federal technical assistance centers, and the federal Office of Special Education Programs (OSEP) on IDEA Part B statute and regulation requirements. The financial specialist develops and provides technical assistance and guidance, financial projections, recommendations on appropriations, policy analysis, and in-depth complex oversight regarding IDEA Part B special education federal funds. Additional duties include tracking and monitoring progress on program requirements, local district maintenance of effort and excess cost compliance testing, analyzing IDEA Part B program policy changes and updates and implements procedures, overseeing new significant charter school, equitable services, and early intervening funding.

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 75

Serve as the financial specialist overseeing and managing financial matters for the department and local school district's compliance with IDEA Part B program fiscal, Uniform Guidance, and other fiscal related requirements.

Individual tasks related to the duty:

- Oversee and maintain special education financial policies, procedures, and processes. Update financial policies, procedures, and processes when IDEA Part B requirements change.
- Interpret federal and state statute, regulation, and law related to IDEA Part B fiscal responsibilities to ensure MDE and school districts meet federal requirements related to cost reporting and reimbursement of activity and costs eligible for federal reimbursement.
- Act as a liaison and serves as a technical advisor with the federal Office of Special Education Programs (OSEP) and maintains expertise in special education program fiscal requirements **and** in school business office processes. Recommends legislative appropriation transfers and supplemental appropriations.
- Oversee IDEA Part B use of funds (CFR 300.208) fiscal program requirements and financial projections, provide technical assistance to the office, school districts, other state agencies, and stakeholders, monitor and ensure systems are maintained to meet requirements.
- Oversee IDEA Part B treatment of charter schools (CFR 300.209) fiscal program requirements and financial projections, provide technical assistance to the office, school districts, other state agencies, and stakeholders, and monitor and ensure systems are maintained to meet requirements.
- Oversee IDEA Part B maintenance of effort (CFR 300.203) program requirements and financial projections, provide technical assistance to the office, school districts, other state agencies, and stakeholders, and monitor and ensure systems are maintained to meet requirements.
- Oversee IDEA Part B early intervening services (CFR 300.226) program requirements and financial projections, provide technical assistance to the office, school districts, other state agencies, and stakeholders, and monitor and ensure systems are maintained to meet requirements.
- Oversee IDEA Part B state monitoring and enforcement (CFR 300.600) program requirements and financial projections, provide technical assistance to the office, school districts, other state agencies, and stakeholders, and monitor and ensure systems are maintained to meet requirements.
- Formulates recommendations and research best practices for continuous improvement with meeting IDEA Part B fiscal program requirements.
- Develop special finance studies needed by internal or external customers, costing out proposed changes in law, rules, legislation, and projected special projects.
- Collect and maintain program data necessary to meet program reporting requirements for IDEA Part B and new initiatives/activities required by state and/or federal changes including legislative changes.
- Develop and maintain critical relationships with state and federal organizations/stakeholders to keep current and providing influence affecting implementation of fiscal requirements.
- Oversee and maintain detailed processes to ensure fiscal requirements are met timely, efficiently, consistently, and accurately.

Duty 2

General Summary:

Percentage: 15

Serve as the technical advisor and liaison to the department, intermediate and school districts, and stakeholders, to coordinate the development and implementation of training and presentations to ensure competency and understanding of required program fiscal requirements.

Individual tasks related to the duty:

- Plan and coordinate the fiscal program training of internal staff, external stakeholders, intermediate and local school districts.
- Develop standardized PowerPoints or other methods to be used for training and presenting and providing program finance updates to organization, groups, and stakeholders meeting a variety of needs.
- Present to various organizations and groups such as the Michigan School Business Officials, Michigan Certified Public Accountants, and other stakeholder groups.
- Evaluate on-going IDEA Part B fiscal program training needs.
- Develop technical assistance in a variety of formats accessible to stakeholders.
- Develop critical relationships with stakeholder organizations to identify technical assistance needs.
- Ensure technical assistance documents are developed to train internal staff.
- Update technical assistance documents as needed to address changes and/or ongoing improvement.
- Develop standardized processes/procedures to inform stakeholders when updates have been made.

Duty 3

General Summary:

Percentage: 10

Other duties as assigned

Individual tasks related to the duty:

- Provide Program Finance updates to various organizations, groups, and internal staff.
- Conducts special projects and studies as assigned.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

- Guide staff and local and intermediate school districts in determining the application of criteria and procedures related to IDEA federal fiscal requirements.
- Prepare reports, propose criteria, and develop new policy language related to IDEA fiscal requirements including relevant state school aid act language.
- Oversee financial policy coordination for IDEA fiscal requirements.

17. Describe the types of decisions that require the supervisor's review.

- Recommendations for changes in law, rule or policy are reviewed by the Finance Manager 15 or State Office Administrator 17 prior to submission to the State Superintendent's office or the State Board of Education for implementation.
- Formal correspondence with the State Legislature.
- Modification of policies to align with changes in federal law.
- Decisions that transcend organization lines of authority as well as decisions that would affect policy or require Supervisors or Director approval.
- Politically sensitive matters.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Typical office environment and requires the use of general office equipment.

Moderate physical activity is required to transport materials for technical assistance, meetings, monitoring, etc.

Must be able to travel.

Significant computer screen time

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

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|----------------------------|------------------------------------|----------------------------|-----------------------------------|
| ☐ N | Complete and sign service ratings. | ☐ N | Assign work. |
| ☐ N | Provide formal written counseling. | ☐ N | Approve work. |
| ☐ N | Approve leave requests. | ☐ N | Review work. |
| ☐ N | Approve time and attendance. | ☐ N | Provide guidance on work methods. |
| ☐ N | Orally reprimand. | ☐ N | Train employees in the work. |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

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24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

New position.

25. What is the function of the work area and how does this position fit into that function?

The Office of Special Education is responsible for the oversight of both federal and state funding for the delivery of programs and services to children with disabilities aged 0-26. The Office of Special Education has the general responsibility to assure compliance with all state and federal standards for special education, allowing all students with disabilities access to a free and appropriate public education. This position is responsible for the oversight of fiscal and fiscal related requirements to the State receiving the eighth largest state IDEA Part B award of over \$446 million annually, providing technical assistance to ensure the requirements are met, coordinating the development and implementation of policies, guidelines, and procedures, including the IDEA State Level-Maintenance Effort, Local level Maintenance of Effort, Excess Cost, Coordinated Early Intervening Services (CEIS), New and Significantly Expanding Charter Schools, Proportionate Share, and all other IDEA statutory and regulatory fiscal requirements.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major with at least 12 semester (18 term) credits in one or a combination of the following: accounting, finance, or economics.

EXPERIENCE:

Financial Specialist 13 - 15

Four years of professional experience equivalent to a Financial Analyst; including two years equivalent to a Financial Analyst P11, Accountant P11, or Auditor P11 or one year equivalent to a Financial Analyst 12, Accountant 12, or Auditor 12.

Alternate Education and Experience

Financial Specialist 13 - 15

Possession of a Certificate in Public Accounting (CPA) may be substituted for one year of Financial Analyst P11 experience.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of state and federal rules and regulations pertaining to special education programs and services and a working knowledge of Michigan education rules and laws, substantial knowledge of the IDEA specifically IDEA fiscal requirements.
- Knowledge of public school finance, pupil accounting, special education transportation, and special education finance.
- Knowledge of complex IDEA federal fiscal requirements.

CERTIFICATES, LICENSES, REGISTRATIONS:

NA

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

NA

I certify that the entries on these pages are accurate and complete.

JOETTA PARKER

11/14/2025

Appointing Authority

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee	Date
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