



ANALYST-FINANCIAL

DEFINITION:

Under the supervision of the Director of Fiscal Services, performs professional accounting, budgeting and financial functions in the maintenance of the District's ledgers and records, and prepares reports to aid in policy decisions and District planning; compiles financial data covering a variety of funding sources and collaborates with other District personnel in financial related matters and performs other related work as required. This job requires specialized technical knowledge as well as strong organizational skills, problem solving skills and attention to detail.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Assists in projecting, preparing, administering, reporting and auditing the District's budget; prepares budget projections and development; makes independent judgments regarding budget per established procedures and guidelines; maintains compliance with Board policies and procedures, state and federal guidelines and requirements.
- Prepares, analyzes, and reports budget data for internal and external users such as administration, Board committees, sites and others; prepares comprehensive and accurate financial reports.
- Analyzes information regarding financial, enrollment, statistical, state and federal programs; prepares budget recommendations and performs other fiscal planning activities.
- Performs specialized and technical work requiring the application and interpretation of data, facts, procedures and policies; provides functional or technical guidance in obtaining, preparing, sharing and exchanging data with outside agencies and administrative, technical, clerical personnel.
- Provides financial analysis and develops financial models based on historical and projected trends for educational organizations; develops scenarios to District administration to maximize funding and use of funds.
- Researches possibilities for more effective performance in terms of dollars and time; implements adopted plans.
- Analyzes statistical data, program requirements and contractual requirements.
- Compiles basic data, prepares tables and charts; drafts reports for use in fiscal planning for the District.
- Develops and maintains spreadsheet models and other automated documents for reporting purposes as assigned; develops, maintains and customizes reporting formats as requested.
- Coordinates fiscal accountability activities; audits individual budgets, reports, sites and programs.
- Assists fiscal services in effective financial management to ensure District solvency and fiscal accountability.
- Reviews board actions for items which may impact the budget and makes appropriate recommendations.
- Collaborates with fiscal, human resources and information technology departments to develop reports and reporting guidelines; coordinates and assists with new system implementations as they occur.
- Conducts surveys and compiles data from other districts, other governmental agencies and various school organizations.
- Assists school sites in managing associated student body (ASB) accounts and funds; develops and maintains effective procedures for ASB offices; trains ASB staff and fiscal staff regarding ASB policies.
- Operates a variety of office equipment including a copier, computer and assigned software.
- Communicates with personnel and a variety of outside agencies to exchange information and resolve issues or concerns.
- Ensures compliance with laws and regulations in the various accounting records, procedures and systems of internal controls to determine compliance.
- Attends and participates in various meetings as assigned.

QUALIFICATIONS GUIDE

Knowledge of:

- General accounting and budgeting principles, practices, procedures and methods including accounting, auditing, and budgeting.
- Computer information system operations; capabilities and applications relating to accounting, budget development, and financial management.
- Financial and statistical analysis techniques and principles.
- Associated Student Body (ASB) accounts and funding policies and principles.
- Recent developments, current literature, and sources of information regarding accounting and financial systems.
- Basic methods, procedures and practices of financial and statistical record keeping.
- Database and spreadsheet management.
- Pertinent federal, state, and local laws, codes, and regulations including those pertaining to educational financial record keeping and control activities.
- Preparation of financial statements and comprehensive accounting reports.
- Accounting, budget and business functions of an educational organization.
- Financial analysis, projection and statistical record-keeping techniques.
- Modern office practices, procedures, methods, and equipment.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Oral and written communication skills.
- Interpersonal skills including tact, patience and courtesy.
- Current technology and advanced knowledge of applicable accounting and financial software applications.
- Mathematical calculations

Ability to:

- Provide financial analysis and develop financial models based on historical and projected trends for educational organizations.
- Perform specialized and technical services requiring application and interpretation of data, facts, procedures and policies.
- Provide functional and technical guidance in obtaining, preparing, sharing and exchanging data with outside agencies and administrative, technical, clerical personnel.
- Prepare clear and concise financial and accounting analysis reports.
- Interpret, apply and explain laws, rules, regulations, policies and procedures.
- Operate a computer and assigned software to enter data, maintain records and generate reports.
- Evaluate and project annual income and expenditures to determine budget requirements.
- Maintain accurate financial and statistical records.
- Analyze financial data and prepare reports, forecasts and recommendations.
- Work independently with little direction.
- Meet schedules and time lines.
- Plan and organize work.
- Prepare and deliver oral presentations.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Make mathematical calculations with accuracy and speed.
- Conduct original and secondary research with accuracy, objectivity and sound judgement.
- Prepare reports and recommendations in a structured, logical, convincing format.

EDUCATION/EXPERIENCE:

Any combination equivalent to: bachelor's degree in accounting, finance, business administration or related field and one year accounting experience in an educational organization including work with budgetary and fiscal systems, models and procedures. A minimum of three years of recent experience in budgeting, accounting, auditing and financial forecasting or similar job function is required.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Dexterity of hands and fingers to operate a computer keyboard.

- **Seeing to read a variety of materials.**
- **Hearing and speaking to exchange information.**
- **Sitting for extended periods of time.**
- **Lifting, carrying, pushing or pulling light objects up to 10 pounds.**

WORK ENVIRONMENT:

Indoor/Office environment. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

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