



Financial Analyst

Purpose Statement

The job of Financial Analyst is done for the purpose/s of providing support to district activities with specific responsibility for providing financial analysis; compiling and analyzing financial and budget information; developing projection presentations; providing financial forecasting and operating budgets for the district; and conveying information, guidance, and/or recommendations to the Administration, School Board, Superintendent, and/or other District personnel.

This job reports to Business Administrator

Essential Functions

- Analyzes financial information for the purpose of identifying potential budget variances, compiling statistical information, developing procedures, and conforming to established financial practices and regulatory requirements.
- Collaborates with the Director of Accounting and Business Administrator (e.g. providing statistical, analytical and/or budgetary data for CAFR, annual audit, Annual Financial Report, Annual Program report, State and Federal Schedules of Financial Assistance, etc.) for the purpose of conveying information and/or receiving information to complete financial requirements in compliance with state, federal, county, and/or district requirements, regulations, and/or policies.
- Collaborates with Business Administrator and Director of Accounting to develop appropriate system of internal controls for the purpose of ensuring that district assets are properly safeguarded and that the accounting records and reports are accurate and complete.
- Compiles statistical and financial data from a wide variety of sources (e.g. district payroll, fixed assets, district expenditures, report writing, etc.) for the purpose of developing budget recommendations; providing summaries to other personnel; and/or ensuring compliance with established guidelines.
- Coordinates with district personnel for the purpose of implementing and maintaining services and/or programs.
- Informs personnel regarding a variety of procedures and program requirements for the purpose of providing necessary information for making decisions, taking appropriate action and/or complying with established fiscal guidelines.
- Maintains a variety of fiscal information, files and records (e.g. grants, new funding, HR data, HR forms, etc.) for the purpose of providing an up-to-date reference and audit trail for compliance.
- Maintains and balances one hundred and fifty-million dollar budget for the purpose of ensuring budget expenses are allowable; maximizing use of funds and ensuring overall district budget operations are in accordance with state, federal, county, and district guidelines.
- Monitors balances of assigned programs and related financial activity for the purpose of ensuring that allocations are accurate, related revenues are generated, expenses are within budget limits and/or fiscal practices are followed.
- Participates in meetings, workshops and seminars for the purpose of conveying and/or gathering information required to perform functions.
- Prepares a wide variety of documents, reports, and supporting materials (e.g. GFOA and ASBO annual award winning budgets and supporting documents, annual program reports, financial reports, projections and forecasts for future operations, income entries, fund transfers, journal entries, etc.) for the purpose of providing written support and/or conveying information in compliance with district and state guidelines.

- Presents a wide variety of financial and reported information to various parties (schools, principals, Board of Education, etc.) for the purpose of communicating information, gaining feedback and ensuring adherence to established internal controls.
- Processes a variety of fiscal information for the purpose of updating records and/or authorizing action in compliance with accounting requirements.
- Provides technical expertise and direction to administration regarding financial activities for the purpose of conveying pertinent information regarding the organizations financial operations and ensuring compliance with established policies, practices, and regulating requirements.
- Recommends policies, procedures and/or actions on issues that relate to financial operations for the purpose of providing direction and/or making decisions for the district.
- Researches a variety of financial and administrative topics for the purpose of providing information and/or recommendations that impact the organizations operations.
- Responds to a variety of inquiries from a wide variety of internal and external sources (e.g. principals, directors, public, etc.) for the purpose of conveying information and/or identifying the relevant issues and recommending or implementing a plan of action that will efficiently resolve the issue.
- Trains district personnel on the use of the financial/budget accounting software for the purpose of ensuring software is used efficiently and effectively.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications

Skills, Knowledge and Abilities

SKILLS are required to perform multiple, technical tasks with a need to periodically upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: applying pertinent codes, policies, regulations and/or laws; communicating with persons of varied cultural and educational backgrounds; operating standard office equipment including utilizing pertinent software applications; preparing budgets and financial plans; preparing and maintaining accurate records; and analyzing budgeting and cost control interpersonal aptitude.; using Microsoft Office software applications including Word, Excel, PowerPoint and Access.

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: codes/laws/rules/regulations/policies; and bookkeeping/accounting practices.

ABILITY is required to schedule activities, meetings, and/or events; routinely gather, collate, and/or classify data; and consider a number of factors when using equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing a variety of complex processes; and utilize equipment under a variety of conditions for multiple purposes. Ability is also required to work with a diversity of individuals and/or groups; work with data of widely varied types and/or purposes; and utilize a variety of job-related equipment. Independent problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate to significant. Specific ability based competencies required to satisfactorily perform the functions of the job include: adapting to changing work environment and/or priorities; being attentive to detail; meeting deadlines and schedules; managing multiple projects; and working under time constraints.

Responsibility

Responsibilities include: working under limited supervision using standardized practices and/or methods; providing information and/or advising others; determining the use of funds. Utilization of significant resources from other work units is sometimes required to perform the job's functions. There is a continual opportunity to significantly impact the organization's services.

Work Environment

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, and significant fine finger dexterity. Generally the job requires 90% sitting, 10% walking, and 0% standing. This job is performed in a generally clean and healthy environment.

Experience: Job related experience within a specialized field is required.

Education: Bachelors degree in job-related area.

Equivalency:

Required Testing:

Certificates and Licenses

Continuing Educ. / Training:

Clearances

Criminal Justice Fingerprint/Background Clearance

FLSA Status

Approval Date

Salary Grade

Exempt

Level 4