

**CLOVIS UNIFIED SCHOOL DISTRICT****POSITION DESCRIPTION**


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<b>Position:</b>	Financial Analyst	<b>FLSA:</b>	Exempt
<b>Department/Site:</b>	Budget and Finance	<b>Salary Grade:</b>	122
<b>Reports to/Evaluated by:</b>	Director of Budget and Finance or Designated Supervisor	<b>Salary Schedule:</b>	Classified Management

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**SUMMARY**

Under general direction, the purpose of the job is to perform a variety of highly analytical duties of a financial, inferential, statistical, or general business nature to support business and program decisions in a variety of departments. Employees in this job classification function at journey professional level to accomplish assigned functions according to established schedules, calendars, projects, and programs of the department. Work may include participating in organization-wide projects such as annual budget development, capital expenditure proposals, etc. Prepares accurate and timely financial and statistical reporting from District and program-based accounting systems.

**DISTINGUISHING CAREER FEATURES**

The Financial Analyst is generally regarded as a high level Accountant, with orientation towards budget and financial planning, although may also encompass management duties and accounting operations. Positions in this classification apply professional level knowledge of generally accepted accounting principles, methods and practices; in-depth knowledge of revenue and expenditure budgets, and categorical and fee-based programs. Position exercises independent and highly technical thought and analysis to produce reports, recommendations, and statements. Problem challenges are highly technical in nature, human relations challenges involve the exchange of technical information, training of staff and regular interface with other departments and agencies.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Performs a wide variety highly complex accounting, financial analysis and reporting work auditing, reconciling and maintaining financial records in support of the assigned unit; including State and Federal Categorical Programs Maintains and processes transfers, budgets, journals and ledgers of income, expenditures and encumbrances.
- Conducts, prepares, and submits systematic and periodic reviews of various program and department budgets, preparing projections of variance to approved budgets. Creates and updates Standard Operating Procedures.
- Prepares and audits a variety of financial, statistical and budgetary reports statements and records related to assigned accounting functions. Reviews and analyzes financial statements, records and reports to ensure accuracy, completeness, and compliance. Implements program budget revisions in accordance with designated specifications.
- Conducts financial, statistical, and operational studies of a variety of school operations. Prepares findings, recommendations, and discussion for management review and action.

- Analyzes and interprets legislative, state and federal directives; communicates findings to administrators and management. Coordinates necessary recommendations for revisions as required for financially sound and consistent policies concerning budget accountability for funds operated by District or program.
- Analyzes budgeting and accounting record procedures to ensure systems internal controls and compliance with regulatory requirements, Board Policies and Administrative Regulations.
- Prepares various comparative analysis reports to be presented to management. Prepares various fiscal documentation regarding accounting activities, e.g., weekly, monthly and annual reports, draft and revised codes and ordinances.
- Prepares Federal, State and local revenue and expenditure budgets associated with categorical and fee-based programs. Participates in preparing the review, development and maintenance of budgets; participates in preparing the periodic budget update document as it relates to funds assigned.
- Oversees, calculates, posts, audits and adjusts journal entries including year end closing, account reconciliation, reporting, and auditing; monitors, evaluates and reconciles assigned accounts and budgets; updates accounts to reflect revenue and expenditures. Coordinates input of budget data. Implements procedures for specializing budgets. Imputs account item transfers.
- Manages and analyzes budget reports and preparation of recommendations for auditing and internal controls. Evaluates budgets to ensure adequate funds exist prior to authorization. Forecasts short-term and long-term projections of revenues and expenditures. Provides timely and accurate information relating to budget status.
- Allocates and coordinates the distribution of Categorical Funds for school site programs.
- Trains staff associated with the budgets regarding program accountability, current school finance, state and federal fiscal issues May coordinate and conduct workshops and in-services reviewing program guidelines, financial record keeping and reporting; prepares instructional materials.
- Verifies and serves as a resource for new and relocated jobs, fielding staffing level questions regarding budgets, ensuring proper account and coding for position control, site allocations and related information.
- May receive, review, and process requisitions from various departments and District sites; tracks requisition processes, including initial receiving, coding and tracking; creates new positions and enters and updates position information in the District's financial system.
- Collaborates with Human Resources, Payroll, and Budget/Finance Department staff to ensure the accuracy of position control setup and maintenance.
- May apply knowledge of the State mandate reimbursement process to monitor mandate related tasks within the District. In coordination with the mandate consultant, monitors mandate related activities by District staff to ensure proper documentation is retained and procedures are in compliance.

- Performs other duties as required to accomplish the objectives of the position.

## **QUALIFICATIONS**

**Knowledge and Skills:** The position requires thorough specialized and professional technical knowledge of financial analysis and generally accepted accounting principles and practices for governmental accounting. Requires a working knowledge of audit requirements including schedules and documentation. Requires a working knowledge of automated accounting systems and relational databases. Requires a working knowledge of the laws governing accounting transactions, financial and attendance reporting., and Associated Student Body guidelines. Requires a working knowledge of the practices and techniques in accumulating cost accounting information, including allocation of accounting data to determine standard costs or rates. Requires well-developed oral language and writing skill to prepare procedures and reports. Requires sufficient business math skills to perform algebraic and statistical computations. Requires sufficient human relations skill to exercise patience and discretion in communications with others inside and outside the organizations, and to communicate technical concepts to others. Must know and understand the practices and principles of supervising staff.

**Abilities:** Requires the ability to prepare trial balance financial summaries, account adjustments, and custom reports using PC based spreadsheets and relational databases. Requires the ability to work within, maintain, and review compliance to internal accounting controls. Requires ability to initiate and conduct technical research, complete complex arithmetic, algebraic and statistical computations, solve highly technical problems associated with financial transactions. Must be able to supervise and lead staff in a manner which encourages high morale and efficiency.

**Physical Abilities:** Requires sufficient hand-eye-arm coordination to use a keyboard and 10-key plus arm/hand movements to retrieve work materials and operate a variety of general office equipment. Requires visual acuity to read words and numbers. Requires auditory ability to carry on conversations over the phone and in person.

**Working Conditions:** Work is performed indoors where minimal safety considerations exist.

**Education and Experience:** Bachelor's Degree in business administration or accounting; supplemented by two (2) years' experience in a responsible accounting/auditing capacity, e.g., preparing cost-benefit analyses, auditing reports, special studies of internal operations, and multi-departmental budget analyses. Additional experience may substitute for some higher education. Preferable one (1) year supervisory experience.

**Licenses and Certificates:** Requires a valid driver's license.