

SENIOR FINANCIAL ANALYST

DEFINITION

Assists an administrator by conducting complex studies affecting District-wide programs and planning and carrying out activities involving analysis of financial matters related to grant proposals, position control, and administration of fiscal responsibilities.

TYPICAL DUTIES

Performs a variety of analytical tasks related to financial and administrative activities involving some of the following functions:

- Provides cost and staffing information and financial guidance to staff involved in proposal preparation and grant application
- Reviews a variety of budget and fiscal documents to determine the status and currency of the organization's financial position
- Designs, develops, and maintains forms, charts, graphics, and status boards that depict the processes and status of an organization's budget, staffing, and programs
- Analyzes a variety of federal and State laws and guidelines to assure correct utilization of funds from a variety of sources
- Compiles and analyzes data for reports that relate to potential funding sources for special programs
- Reviews a variety of instructions and regulations to plan for presentation of data and narrative explanations required in completing grant proposals
- Reviews budgetary control systems for improvements and coordinates changes with the Business Services, Budget and Financial Planning, and Information Technology Divisions
- Conducts research studies and prepares reports regarding policies, procedures, organization structure, and other administrative and fiscal needs
- Monitors contract expenditures to ensure compliance with all policies and procedures.
- Oversees invoice payments to ensure compliance with all policies and procedures.
- Composes, reviews, and edits a variety of financial statements, bulletins, and Board reports
- Reviews requests for new classified positions, reclassifications, and other classified personnel actions related to budget and staffing
- May analyze and make recommendations regarding proposed legislation
- Confers with school administrators regarding budgetary records control
- Maintains files and records of fund allocations and subtracts expenditures to prevent overdrafts.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Senior Financial Analyst serves as a staff assistant to an administrator by independently conducting complex studies and making recommendations related to grant proposals, budget preparation and modification, expenditure analysis, and position control.

Classes in the Administrative Analysis Group are assigned some of the same duties; however, the preponderance of duties are in general administrative matters not directly related to budget and financial functions.

A Principal Financial Analyst serves as a specialist in financial matters and procedures related to proposal and budget preparation and modification, expenditure analysis, position control, and income forecasting for special or regular programs. This class is evaluated at a higher level than Senior Financial Analyst in scope and complexity of assigned duties and in level of authority exercised.

A Financial Analyst performs a variety of professional-level staff activities that are primarily oriented toward the analysis of financial data and budgets, the preparation of year-end fund availability reports, and long-range cash flow projections.

SUPERVISION

General direction is received from an administrator. Supervision may be exercised over clerical or staff personnel as assigned.

CLASS QUALIFICATIONS

Knowledge of:

- Governmental accounting and budgeting theory, practices, and procedures; cost analysis; and organizational analysis
- City, County, State, and federal laws and regulations and policies of the District as they affect financial activities
- Statistical methods, statistical analysis, and graphic presentations
- Basic application of data processing systems to financial analysis
- Organization and functions of the District administration
- Basic structure of the District budget

Ability to:

- Communicate effectively, orally and in writing
- Prepare clear, concise reports containing a variety of financial and administrative data
- Devise a variety of methods, procedures, and systems to resolve budget, financial, and administrative problems
- Work effectively with all levels of District employees and the public
- Use applications such as Microsoft Word, Excel, Access, and PowerPoint

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university, preferably with a major in accounting, public or business administration, economics, or a related field. Experience in finance, budgeting, or a related field, beyond that required, may be substituted for up to two years of the required education on a year-for-year basis provided that the requirement of a high school diploma or equivalent is met.

Experience:

Four years of professional-level analytical experience, including at least two years of experience involving financial analysis, such as analysis of District, program, or school-level budgets; cash flows; grant proposals; or income and appropriation statements. One year of the required experience must have been in a governmental agency.

Special:

A valid California Driver License.
Use of an automobile.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and abilities. Management retains the discretion to add or change typical duties of a position at any time.

Revised
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SJ