

Financial Analyst - High School

Purpose Statement

The job of Financial Analyst - High School is done for the purpose of providing support to a comprehensive high school with specific responsibility for assisting the Business Manager; assisting in the formulation, analysis and execution of the annual budget and financial accounting work; identifying budget variances and recommending appropriate actions to comply with fiscal requirements and budget guidelines; analyzing costs of programs and services; and providing analytical information as required by administrative and program personnel and/or regulatory agencies.

This job reports to Assigned Supervisor

Essential Functions

- Advises administrative staff and school officials of the implications of funding alternatives, proposed program adjustments, and revenue options for the purpose of providing assistance to site administration in identifying and resolving budget variances and other financial issues, compiling statistical information, and identifying pertinent information for development of long-term budgetary goals in alignment with established guidelines.
- Assists auditors for the purpose of providing supporting documentation and/or information on internal process required for audit.
- Calculates cost allocations and projections for a variety of financial processes for the purpose of determining the financial resources sufficient for enrollment levels.
- Communicates with community members, parents, athletic coaches, students and others for the purpose of educating others regarding Internal Control procedures and District policies and ensuring accurate information exchange relating to internal controls.
- Develops financial reports for the purpose of summarizing budget and financial data to share with management for use in decision-making processes.
- Maintains manual and electronic files, documents and records for the purpose of providing up-to-date reference and documentation for audit.
- Manages all business functions, including all aspects of the school website, for the purpose of ensuring historical documentation and accuracy.
- Oversees a variety of financial processes for the purpose of ensuring accurate implementation of financial processes for school site, documenting activities, providing reference, conveying information, and complying with established financial and administrative requirements.
- Participates in required site meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.
- Provides support for staff in areas of responsibility for the purpose of preparing the information and data required for developing budgets, controlling expenditures and implementing site financial processes.
- Responds to inquiries of staff and administration regarding financial procedures for the purpose of providing information, direction and/or referral for addressing inquiry.
- Submits budget-related documents for the purpose of updating and distributing information, authorizing for action and/or complying with established accounting practices.

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 occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; performing standard bookkeeping; preparing and maintaining accurate records; analyzing budgets; analyzing data; applying assessment instruments; classifying data and/or information; collecting money; estimating required resources; and planning and managing projects.

KNOWLEDGE is required to perform basic math, including calculations using fractions, percents, and/or ratios; read technical information, compose a variety of documents, and/or facilitate group discussions; and solve practical problems. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: California Education Code and District Policies and directives; accounting/bookkeeping principles; financial analyses and/or budget analyses; electronic spreadsheets and worked processing; principles and objectives of budget preparation; management evaluation and analysis; applicable codes/laws/rules/regulations/policies; cost/fund accounting; and recordkeeping and record retention practices.

ABILITY is required to schedule activities, meetings, and/or events; often gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to work with others in a variety of circumstances; work with data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job-related equipment. Problem solving is required to identify issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited to moderate. Specific ability based competencies required to satisfactorily perform the functions of the job include: establishing and maintaining effective working relationships; adapting to changing work priorities; communicating with diverse groups; meeting deadlines and schedules; setting priorities; working as part of a team; working with detailed information/data; accuracy and attention to detail; analyzing issues and determining appropriate course of action; maintaining confidentiality; multi-tasking; and working with frequent interruptions.

Responsibility

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; monitoring budget expenditures. Utilization of some resources from other work units is often required to perform the job's functions. There is a continual opportunity to 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, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 60% sitting, 20% walking, and 20% standing. This job is performed in a generally clean and healthy environment.

Experience:

Six years of experience in financial record keeping and the preparation or analysis of budgets, preferably in a California school district. A B.S. in Accounting or related field preferred.

Education (Minimum):

High school diploma or equivalent. B.S. in Accounting or related field is preferred.

Required Testing

None Required

Certificates and Licenses

None Required

Continuing Educ. / Training

Maintain Certifications and/or Licenses
District Mandated Training

Clearances

Criminal Background Clearance
Tuberculosis Clearance

FLSA Status

Non Exempt

Approval Date

December 14, 2021

Salary Grade

Range 24

Revised Date