

LAGUNA BEACH UNIFIED SCHOOL DISTRICT
Job Description: Financial Analyst
(Confidential Employee)

BASIC FUNCTION:

Under direct supervision of the Assistant Superintendent, Business Services, monitors the District's fiscal, accounting, payroll, and purchasing operations; generates reports and provides advice and assistance to site and District administration regarding the District's fiscal procedures, and assists with the development District's annual budget.

ESSENTIAL DUTIES:

- Develops accounting, payroll, purchasing, and financial record management and reporting systems and procedures.
- Monitors and audits the accounting and financial record management and reporting functions to assure that established operational procedures, guidelines, and internal controls are followed.
- Prepares or coordinates the preparation of materials for posting or input into computerized information systems.
- Develops, implements and monitors departmental procedures, forms, and regulations to assure efficient and effective practices.
- Ensures compliance with appropriate laws, codes, rules, and regulations and provides for the establishment and maintenance of appropriate records and audit trails.
- Performs higher-level technical and specialized accounting and financial record management and reporting functions.
- Advises and assists school and District personnel regarding matters relating to accounting and financial record management and reporting systems, payroll, and purchasing functions.
- Generates accounting and financial reports for district administration, including data that may be used in confidential negotiations.
- Coordinates the District's annual audit.

OTHER REPRESENTATIVE DUTIES:

- Assists with the development and monitoring of the District's annual budget and multi-year projections and prepares or monitors the preparation of all related State reports; plans, organizes, and monitors the accounting functions of the District, including internal auditing and other related fiscal services; plans, organizes, directs, and monitors the District's payroll and purchasing operations.
- Collaborates and communicates with business services division members to provide consistent, excellent customer services and facilitates cross training to support office, especially as needed during the absence of other team members.
- Participates in job-related or District trainings as required.
- Performs related duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Principles, methods, practices, and procedures of school district accounting, fiscal record management, auditing procedures, purchasing operations, and payroll systems.
- Legal mandates, policies, and regulations pertaining to educational accounting, payroll, purchasing and fiscal record management and reporting.
- Computer-assisted accounting, payroll, purchasing, and fiscal record management systems and equipment.

- Financial analysis and research procedures as they apply to financial methods.
- Collective bargaining practices and procedures.
- School district attendance accounting, construction project accounting, funding processes including, but not limited to, local control funding formula, and federal, state and local funding.

Ability to:

- Perform responsible and technical accounting and fiscal planning functions and activities.
- Prepare fiscal, financial, and narrative reports in a clear and concise manner.
- Review, audit, and verify financial statements and related summaries and reports.
- Communicate effectively in oral and written form.
- Understand and carry out oral and written directions with minimal accountability controls.
- Interpret laws, rules and regulations.
- Establish and maintain cooperative working relationships with students, staff, and public.
- Review, evaluate, and approve purchasing documents.
- Review, analyze, develop and manage computerized accounting and other information systems.

MINIMUM QUALIFICATIONS:

Experience:

Five years of progressively responsible experience in accounting, business administration, or related experience comparable to that required in order to complete fiscal operations in a California school district. School district experience preferred with responsibility in fiscal and business services.

Education:

Required: Bachelor's Degree in accounting, business administration, or closely related field from an accredited institution of higher learning.

Personal Qualities:

- Independent worker
- Good organizational skills
- Maturity and good judgment
- Neat and clean appearance
- Willingness to assume a wide range of responsibilities
- Willingness to learn new skills
- Willingness to continuously improve
- Pleasant interpersonal skills
- Commitment to professional courtesy
- Demonstrated ethical standards
- Commitment to professional responsibility
- High intrinsic motivation

WORKING CONDITIONS:

Environment:

- Indoor office environment.
- Low to Moderate noise level.

Physical Requirements:

- Ability to frequently stand, reach, grasp, stoop, bend, push, pull, kneel, squat, and twist.
- Ability to frequently bend at the waist, kneel or crouch to retrieve and file materials.

- Ability to sit for extended periods of time.
- Ability to frequently lift and move up to 20 pounds.
- Dexterity of hands and fingers to operate standard office equipment.
- Seeing to read, post and assure the accuracy of accounting records.
- Hearing and speaking to exchange information.
- Ability to climb stairs.

Operation of Vehicles, Machinery and Equipment Requirements:

- Ability to travel to a variety of locations within a reasonable time frame.
- Must be able to operate office, multimedia, and computer equipment.

Mental and Emotional Requirements:

- Ability to understand, and follow oral and written directions
- Ability to work independently with little direction
- Ability to concentrate to meet numerous deadlines
- Ability to establish and maintain effective working relationships with others
- Ability to make independent decisions to respond to numerous requests, deadlines, and to prioritize assignments
- Ability to exchange information
- Ability to learn the procedures, functions and limitations of assigned and cross trained duties
- Ability to collaborate and contribute to continuous improvement of business department
- Ability to identify office needs and engage in cross training to provide seamless customer service during team member absences.