

BEAVERTON SCHOOL DISTRICT

Position Title: Financial Analyst I
Department: Business Services
Reports To: Administrator for Business Services Budget Manager
Pay Grade: PROF/1
FLSA Status: Exempt
Bargaining Unit: OSEA
Approved Date: 3/2/2010
Revised Date: NA

POSITION PURPOSE:

To provide a variety of entry journey level professional support duties involving financial analysis, processes, and related technical support duties in identifying, analyzing, evaluating, implementing and maintaining systems, policies, and procedures which support school district staff in their use of technology as related to the accumulation, management, analysis and reporting of District financial information and information systems; participates in providing staff assistance to the school administrative team and the school board.

Participates in providing professional financial business services analysis and advisory services to the District in accordance with applicable statutes, ordinances, rules, administrative regulations, policies and procedures. Areas of assignment may include but are not limited to: monitoring accounting transactions, analyzing needs and suggesting improvements in business services processes and systems, researching and analyzing financial business issues and problem situations, evaluating issues, and developing recommendations; supporting system conversions and upgrades, reconciling subsystems and accounts, utilizing various computer systems to extract, format and update data and files, developing and running queries, and generating a variety of computerized reports as assigned. The position works closely with IT staff to ensure the integrity of financial systems and the ability to provide accurate data to support financial business decisions.

DIFFERENTIATING CHARACTERISTICS:

The Financial Analyst I differs from the Financial Analyst II in that the focus of the first level is upon performing first level professional and technical duties, including participating in a variety of financial analysis and research activities, process evaluations, and providing assistance to employees, school principals, and department managers.

The Financial Analyst I receives general supervision from a business services administrator or supervisor. Compared with the complex assignments performed by the Financial Analyst II, assigned duties at this level tend to reflect a moderate level of complexity, requiring the evaluation and application of established policies, internal controls and procedures and are initially performed under general guidance and direction; once learned, assigned duties are performed independently. Proposed decisions or actions that require complex policy interpretation or variation from established policies and procedures typically require higher-level review. This classification does not supervise, but may provide technical direction and support to other staff.

EXAMPLES OF DUTIES:

Essential functions, as defined under the Americans with Disabilities Act, may include the following duties and responsibilities, knowledge, skills and other characteristics. Depending upon assignment, the incumbent may perform a combination of some or all of the following duties, which are a representative sample of the level of work appropriate to this classification.

Duties may include but are not limited to the following:

- 1) Provides general assistance and technical support to the business services administrators or other staff in the Business Services Department; provides assistance to principals, department managers and District staff in the identification and resolution of school financial business services requirements, processes, and related technical issues.

BEAVERTON SCHOOL DISTRICT

- 2) Responds to inquiries and questions from administrators, supervisors, and employees; accurately interprets, applies and explains existing financial services policies, internal controls, procedures, methods, reports, and systems, and provides other type of assistance in assigned area(s) of responsibility.
- 3) Assists with the review and monitoring of financial practices for compliance with generally accepted accounting principles, internal control policies, and Oregon budget law and District policy; analyzes, reviews and recommends action on proposed and approved legislation and regulations. Participates and/or develops and maintains financial records for funds, projects, grants, activities or other accounting entities
- 4) Participates in providing technical analyses, information and professional support to management and policy bodies on various fiscal, budgetary and financial issues, procedures or systems; assists auditors and others in their reviews of the District's City's financial procedures, records and systems.
- 5) Assists with the development of effective financial business policies and procedures, and the evaluation of the effectiveness of the District's financial business operations and structures; evaluates and recommends strategies and processes to achieve goals; evaluates proposed changes in District policy and procedures; coordinates the implementation of new policies and system processes.
- 6) Assists in the coordination and development of District-wide long range and strategic financial planning.
- 7) Administers and/or assists in the administration of financial services programs and processes; participates in the evaluation of processes and the development of recommendations for procedural revisions and financial system improvements; assembles, facilitates and/or participates on committees to provide input and recommendations.
- 8) Assists with developing appropriate and efficient methods of data gathering and analysis; gathers information and conducts research on a variety of assigned topics; uses descriptive statistics to analyze data for a variety of situations, problems and studies.
- 9) Conducts surveys and analyze results, and develops preliminary recommendations; uses analytical data to answer specific questions or recommend appropriate changes to systems; develops initial recommendations of options and solutions, including consideration of potential short and long-range impacts and issues; may prepares technical reports and make presentations to District committees and groups.
- 10) Assists with the review and monitoring of financial practices for compliance with generally accepted accounting principles, internal control policies, and Oregon budget law and District policy; assists with analyzing, reviewing, and developing recommendations to address proposed and approved legislation and regulations. Assists with developing and maintaining financial records for funds, projects, grants, activities or other accounting entities.
- 11) Develops and maintains systems, processes, and controls to ensure system efficiency and accuracy, and that efficient system operations meet end user needs; assists with designing financial models, and in creating and/or evaluating proposals for changes in operations.
- 12) Participates in providing financial system support overview for the purpose of providing accuracy of data entered, ability to access system information and to retrieve information in a usable format; participates in the development and implementation of accounting and financial management systems and procedures to serve new activities, or to implement changes in the reporting and control requirements for existing activities. Serves as a resource to District personnel for the purpose of providing information and guidance for internal and external reporting and for utilizing tools to manage data. Researches solutions for the purpose of troubleshooting and problem solving regarding the use of information systems tools; coordinates and works closely with the District's information services staff.

BEAVERTON SCHOOL DISTRICT

- 13) Creates and updates a wide variety of technical and non-technical materials and reports for the purpose of analyzing information, federal and state data submissions, financial reporting and conveying information.
- 14) Develops and writes reports, including descriptive, technical and narrative reports; may develop and design appropriate formats for reports or other written communications.
- 15) Perform related duties and responsibilities as required.

KNOWLEDGE, SKILLS AND ABILITIES:

Principles, practices and techniques of public or business services administration, including knowledge of accounting practices and finance functions in the assigned area(s), which might include financial forecasting, financial system evaluation, cost analysis, fund management, and operational analysis.

Knowledge of:

- Research, reporting, revenue and financial forecasting methods, techniques, and procedures, including applicable financial research methods and data analysis techniques
- Applicable federal, state and local laws, codes and regulations related to accounting and finance; ability to research, interpret and apply federal, state and local laws, regulations and codes.
- Applicable district and departmental policies, and financial systems, or ability to learn within a reasonable amount of time.
- Applicable principles and practices of public records management.

Skills/Ability to:

- Analyze problems, identify alternative solutions, project consequences of proposed actions, recommend solutions and assist with the implementation of selected strategies.
- Interpret information and explain applicable concepts and options to others.
- Review a variety of assigned financial business and system situations and issues of moderate complexity, and identify applicable policies and procedures; ability to understand, analyze, prepare recommendations, present and assists with the implementation of recommendation to the District's financial systems and controls.
- Compile, monitor and track data, identify relevant data, analyze problems, evaluate alternatives and make appropriate recommendations
- Develop an understanding of the functions, interrelationships, and limitations of automated financial systems; ability to work effectively with information services staff; participate in the analysis of financial operations to identify inefficiencies or internal control weaknesses; ability to develop initial recommendations and implement corrective actions as assigned.
- Design and create clear, logical, concise, accurate reports from the District's financial system to be used for financial analysis or reporting
- Communicate effectively both orally and in writing with diverse customers, employees, contractors, other districts, agencies, public officials and the general public.
- Effectively work independently and/or in a team environment, establish and maintain effective cooperative working relationships with employees at all levels and the general public.
- Use word processing, spreadsheet, report writing and database programs or other application software as required for position, and monitor and maintain database integrity.
- Maintain confidentiality requirements.

BEAVERTON SCHOOL DISTRICT

EDUCATION AND EXPERIENCE:

Any combination of experience and training that would provide the desired skills, required knowledge and abilities is appropriate. A representative way to obtain the required knowledge and abilities would be:

- Graduation from a four-year college or university with a major in business administration, accounting
- OR a closely related field;
- AND two years of accounting or finance work experience in the assigned area(s), preferably in a public sector environment
- Some experience in the development and implementation of financial information systems and business/finance systems is preferred.

LICENSING/SPECIAL REQUIREMENTS:

- Possession of or ability to obtain, a valid Oregon or Washington driver's license

WORKING CONDITIONS:

Work is performed in a standard office setting. Requires regular focus on a computer screen. May be required to sit, keyboard, write, hear and speak for extended periods. Work activities may include bending, stooping, and kneeling. May be required to lift up to 20 pounds. Occasional attendance at meetings or activities outside of normal working hours.

The statements contained herein reflect general details as necessary to describe the principle functions of this job, the level of knowledge and skill typically required and the scope of responsibility, but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload.

The Beaverton School District recognizes the diversity and worth of all individuals and groups. It is the policy of the Beaverton School District that there will be no discrimination or harassment of individuals or groups based on race, color, religion, gender, sexual orientation, gender identity, gender expression, national origin, marital status, age, veterans status, genetic information or disability in any educational programs, activities or employment.