

**JOB DESCRIPTION**  
**San Diego County Office of Education**

**CHARTER SCHOOL FINANCIAL ANALYST**

**Purpose Statement:**

Under general supervision, the Charter School Financial Analyst performs a variety of complex analytical and technical duties to assist with the effective management, implementation, and maintenance of budget and financial reporting related to charter schools.

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Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, as well as being accountable for their actions and their impact.

**Representative Duties:**

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties.

**Essential Functions:**

- Evaluates proposed charter school budgets to prepare comprehensive analysis of financial impact.
- Assist programs to maintain an effective financial management process by reviewing fiscal issues and recommending adjustments to management and program staff.
- Serves as a liaison between project accountants, managers, administrators, directors, charter school operators, local agencies, and the California Department of Education.
- Creates and analyzes statistical information and spreadsheets to perform detailed financial analysis, and create comparisons, reports and graphs, including projected income and expenditures.
- Researches, creates and maintains analytical financial reports.
- Acts as a resource to administrators and staff related to financial and budget guidelines, accounting procedures, program requirements, definitions, and financial applications and operations.
- Interprets, researches, and evaluates projected budget and financial industry trends.
- Recommends effective and appropriate financial methods, techniques, and procedures for measuring and evaluating budget and financial performance.
- Evaluates current procedures and makes recommendations for the improvement of processes and effectiveness in projecting revenue and expenditures.
- Analyzes budget and financial reports obtained from charter schools by reviewing, consolidating, analyzing, and monitoring budget and financial data.
- Audits, reviews, reconciles, and maintains records of accounting transactions for assigned programs, and monitors accounting reconciliations and procedures.

- Analyzes, examines, and assists in effective decision making to ensure proper financial compliance with charter school program goals and requirements.
- Works with charter school operators to prepare preliminary, adopted, interim, and final budgets, and reviews budgets with program administrators to ensure compatibility with charter school program goals and requirements.
- Reviews and monitors accounting resources, goals, and functions to ensure compliance with federal, state, local laws, codes, and regulations.
- Reviews, verifies balances, and analyzes transfer of funds for legality and compliance with state education codes.
- Develops and administers training sessions in workshop and individual settings on various school finance topics and reporting requirements.

**Other Functions:**

- Performs other duties as assigned.

**Job Requirements: Minimum Qualifications:**

**Knowledge and Abilities**

KNOWLEDGE OF:

Principles and practices of accounting and budgeting

Principles, methods and practices of statistics and financial analysis

Charter school financial policies and regulations.

Federal, state, and local laws, codes and regulations affecting assigned work areas.

Operation and application of automated systems relative to business and statistical use.

Business letter writing and basic report preparation.

ABILITY TO:

Compile, analyze, interpret, and report research findings.

Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.

Establish and maintain effective working relationships with various departments and agencies.

Understand, interpret, and explain laws, codes, contracts, regulations, policies, and procedures.

Prepare clear and concise correspondence, reports, and other written materials.

Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.

Communicate clearly and concisely, both orally and in writing; present information effectively in front of both large and small groups.

**Working Environment:**

ENVIRONMENT:

Duties are typically performed in an office setting.

May be designated in an alternate work setting using computer-based equipment to perform duties.

**PHYSICAL ABILITIES:**

Must be able to hear and speak to exchange information; see to perform assigned duties; sit or stand for extended periods of time; possess dexterity of hands and fingers to operate computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files; lift light objects. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

**Education and Experience:**

Experience: Three (3) years of work experience with increasing responsibilities in school finance, budgeting, accounting, or related experience.

Education: A bachelor’s degree from an accredited college or university with major course work in accounting, finance, business, or a related field.

Equivalency: A combination of education and experience equivalent to a bachelor’s degree from an accredited college or university with major course work in accounting, finance, business, or a related field and three (3) years of work experience with increasing responsibilities in school finance, budgeting, accounting, or related experience.

Required Testing

N/A

Certificates, Licenses, Credentials

N/A

Continuing Educ./Training

N/A

Clearances

Criminal Justice Fingerprint/Background Clearance  
Physical Exam including drug screen  
Tuberculosis Clearance

FLSA Status: Non-Exempt

Salary Grade Classified Support Grade 058

Personnel Commission Approved: 7/15/2020

Revised: