

SAN DIEGO COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: **Financial Reporting Analyst, Grade 58**

DEFINITION:

Under general supervision, leads and provides technical guidance to Financial Accounting and Reporting Unit staff on school accounting issues, and state required financial reporting; assists Business Advisors, managers, and school district staff, with the preparation of financial and budgetary reports, financial comparisons; reports and graphs as requested.

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. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

ESSENTIAL FUNCTIONS:

Assists school district administrators with accounting issues and preparation and submission of state-required financial and budgetary reports.

Researches, creates, and maintains detailed financial comparisons, analytical reports, graphs, or query data as requested by consultants and user districts.

Designs report formats.

Develops multi-year projection for school district budgets.

Calculates local funding formula (LCFF) projections funding for school districts.

Serves as liaison for Accounting and Reporting Unit website.

Assists as liaison between the Financial Accounting and Reporting Unit, the State, County Auditor and Controller, districts and County Office staff.

Maintains historical files of Financial Accounting and Reporting and related documentation.

Collects, assembles, and distributes documents and other materials, as required by local, State and Federal requirements.

Responds to inquiries from school districts, SDCOE staff, and local and state agencies to provide and obtain information regarding financial reporting software.

Troubleshoots and collaborates with ITS staff to resolve application or database problems as needed.

Recommends financial software application user improvements and enhancements.

Prepares special and routine correspondence as assigned.

Interacts with district personnel at all levels and provides technical support to unit staff.

NON-ESSENTIAL FUNCTIONS:

Performs related duties as assigned.

CREDENTIALS, CERTIFICATES, LICENSES OR OTHER REQUIREMENTS:

None

EDUCATION AND EXPERIENCE:

A combination of education and experience equivalent to two years of experience working with computer applications for financial and budgetary operations performing comparable duties and responsibilities OR; completion of college-level coursework in accounting, business administration, finance or closely related field and, work experience in the business, financial, or budgetary operation of a major unit in a large organization. Applicants must have experience with advanced spreadsheet and database applications.

KNOWLEDGE AND ABILITIES:**KNOWLEDGE OF:**

Public school finance/accounting principles
Financial and budgetary principles and practices
Computer spreadsheet software
Database development and management
Data analysis
Report design and analysis

ABILITY TO:

Operate a computer and related software including advanced spreadsheet and database applications
Use complex queries and programming/macros in MS Access and MS Excel to manipulate data
Communicate effectively both orally and in writing
Analyze and interpret financial and budgetary reports
Manipulate numerical data in the production of reports
Analyze problems and implement solutions
Work under demanding deadlines and manage multiple tasks
Establish and maintain effective working relationships with all staff levels
Develop and deliver effective instructional presentations, evaluate and utilize a variety of training methods

WORKING CONDITIONS & PHYSICAL ABILITIES:

Office environment.

Must be able to hear and speak to exchange information; see to perform assigned duties; possess dexterity of hands and fingers to operate computer and other office equipment; sit and/or stand for extended periods of time; kneel, bend at the waist, and reach overhead, above the shoulders horizontally, to retrieve and store files and supplies; and lift light objects.

Established	Approved by the Personnel Commission	Revised	FLSA Status	Salary Grade
02/1996	Feb. 1996	07/2003; 03/2007 10/2020	Non-Exempt	Classified Support Grade 58