



## PERSONNEL COMMISSION

**Class Code: 5173**  
**Salary Range: 40 (M2)**

### FISCAL SERVICES ANALYST

#### JOB SUMMARY

Under general direction, plan, organize and participate in the development, analysis, preparation and administration of District fiscal resources in areas such as budget, accounts payable, general ledger, program accounting, payroll, special education, facilities and special projects administration; provide appropriate advice and recommendations for the compliant use of resources, conduct financial studies, prepare reports and analyze data; streamline processes, track project expenditures; perform related duties as assigned.

#### EXAMPLES OF DUTIES

*The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.*

- Plan, organize and participate in the development, analysis, preparation and administration of District fiscal resources; assure compliance with applicable laws, codes, rules and regulations; maintain confidentiality of sensitive and privileged information. **E**
- Conduct financial studies and compile budget projections for preliminary budgets and the final adopted budget; examine trend analysis data, estimated salary increases, tax rates, employee benefits costs, and retirement contributions for all programs. **E**
- Maintain direct contact with district staff and site administrators during the budget preparation and budget administration cycles throughout the fiscal year. **E**
- Control budgeted positions by means of document review, availability of funds, review of expenditures and Chart of Accounts. **E**
- Maintain budget account structure in accordance with state law, regulations and local needs; note changes for reporting requirements; create new accounts as needed. **E**
- Initiate and control budget revisions through appropriation transfers to effect changes needed in program budgets; analyze funding sources, staffing, funding guidelines and balance income to appropriations; prepare documents requiring adjustments for approval. **E**
- Prepare intermediate and long-range projections of resources and appropriations. **E**
- Analyze status of accounts to determine if release of encumbrances can be authorized. **E**
- Initiate, complete and verify a variety of State, Federal and Los Angeles County Office of Education reports and financial statements. **E**
- Recommend policies and procedures for budgeting and cost control based on analysis of programs and site operations and recording and reporting financial data. **E**

- Develop and make recommendations regarding budgets and expenditure plans, including alternatives and priorities, particularly on such matters related to site/department/area levels. ***E***
- Coordinate budget reporting requirements and activities with County and State agencies and keep current on changes in reporting requirements; provide information to or otherwise assist designated auditors. ***E***
- Recommend and implement proper tracking and accounting for projects such as building projects initiated by the Facilities Branch. ***E***
- Download data from existing databases for analysis. ***E***
- Perform analyses of systems or processes in various areas to help design and implement change and streamline processes; provide guidance and ongoing support or continued monitoring to ensure compliance with regulatory agencies; prepare analyses requested by other departments to assist with financial issues. ***E***
- Analyze legislative proposals regarding educational funding and report the potential impact on the District. ***E***
- Train and evaluate the performance of assigned staff; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. ***E***
- Operate a variety of office equipment including a computer and assigned software, ten key adding machine and multi-line telephone; drive a vehicle to conduct work and attend meetings. ***E***
- Organize and document findings of studies and prepare recommendations for implementation of new procedures and systems. ***E***
- Attend and participate in a variety of meetings, conferences and trainings to maintain current knowledge of advances in the field and represent financial interests in interdepartmental projects. ***E***

*Note: At the end of some of the duty statements there is an italicized **E**, which identifies essential duties, required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.*

### **DISTINGUISHING CHARACTERISTICS**

A Fiscal Services Analyst plans, organizes, and participates in the development, analysis, preparation and administration of District fiscal resources in areas such as budget, accounts payable, general ledger, program accounting, payroll, special education, facilities and special projects administration. A Fiscal Services Analyst performs difficult and complex analytical work in developing, preparing and administering budgetary programs and funds and assists managers in the fund management decision-making process. An incumbent works with automated financial systems and computer generated financial reports and may extract data from large databases. An incumbent has ongoing contact with fiscal personnel in other agencies having jurisdiction over school district finances. An incumbent also provides advice and explains technical budgetary requirements or alternatives to District administrators regarding staffing allocations, the scheduling of expenditures, the monitoring of program budgets and management of funds and budgeting and accounting procedures and regulations. An incumbent may perform analyses of systems or processes and provide guidance, ongoing support or continued monitoring to ensure compliance with regulatory agencies.

**EMPLOYMENT STANDARDS**

**Knowledge of:**

Principles and practices of budget preparation and administration and related accounting and record-keeping practices.  
Financial database systems and software capabilities including spreadsheets.  
Principles and techniques of financial analysis and statistical measures and projections.  
Applicable laws, codes rules and regulations related to assigned activities  
Financial record-keeping techniques.  
School district organization and administration.  
Organization and work flow management.  
Interpersonal skills using tact, patience and courtesy.  
Oral and written communication skills.  
Principles and practices of supervision and training.  
Operation of a computer and assigned software.

**Ability to:**

Plan, organize and participate in the development, analysis, preparation and administration of District fiscal resources.  
Develop, compile and analyze financial data and prepare financial forecasts.  
Read and interpret sections of the Education Code and other state laws applicable to the required accounting, budgeting and reporting of finances by school districts.  
Develop worksheets, reports, and effective reporting techniques, including graphs, charts and tables.  
Prepare clear and comprehensive financial reports along with explanatory oral and /or written analysis.  
Analyze, generate, advise on, evaluate and implement financial and/or budgetary procedures for effectiveness and efficiency.  
Utilize computer database systems for financial data collection and analysis.  
Train and evaluate the performance of assigned personnel.  
Make arithmetic calculations quickly and accurately.  
Maintain accurate financial records.  
Operate a variety of office equipment including a computer and assigned software, ten key adding machine and telephone.  
Interpret, apply and explain applicable laws, codes, rules and regulations.  
Establish and maintain cooperative and effective working relationships with others.  
Meet schedules and time lines.  
Plan and organize work.  
Communicate effectively both orally and in writing.  
Maintain confidentiality of sensitive and privileged information.  
Use tact and discretion to persuade others to take appropriate courses of action.

**Education and Training:**

Bachelor's degree in accounting, financial or business administration, or a closely related field.

**Experience:**

Three years of financial experience, preferably in a public agency, involving the analysis of financial data.

Any other combination of training and/or experience which demonstrates that the applicant is likely to possess the required skills, knowledge and abilities may be considered.

**WORKING ENVIRONMENT**

Office environment.

Driving a vehicle to conduct work.

**PHYSICAL DEMANDS**

Dexterity of hands and fingers to operate office equipment.

Sitting for extended periods of time.

Seeing to review and analyze financial records and reports.

Hearing and speaking to exchange information related to the budget function in person or telephonically.

**SPECIAL REQUIREMENTS**

Positions in this class require the use of a personal automobile and possession of a valid California Class C driver's license.

*AMERICANS WITH DISABILITIES ACT*

Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

**APPOINTMENT**

In accordance with Education Code Section 45301, an employee appointed to this class must serve a probationary period of one year during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.

PCA 06-26-97

Rev. 2/14/13