

Job Title: **Senior Financial Analyst**
 Job Family: **Non-Certified**
 Pay Program: **Administrative**
 Typical Work Year: **12 months**

Job Code: **5001**
 FLSA Status: **Exempt - P**
 Pay Range: **L11**

SUMMARY: The Senior Financial Analyst will support District operations through the preparation of annual budgets as well as performing advanced technical analysis to solve business problems and informing key operational decisions. Essential duties include developing the budget, monitoring all financial transactions, meeting with all levels of staff to present financial recommendations and coordinating updates to District financial planning systems.

ESSENTIAL DUTIES AND RESPONSIBILITIES: *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Job Tasks Descriptions	Frequency	% of Time
1. Coordinates, prepares and monitors the district’s annual Financial Plan and Budget. Advises departments and schools on budget processes and requirements. Manages on-going budget operations to include planning, compiling and analyzing data in budget preparation. Creates budget specific reports/spreadsheets, reviews and interprets complex financial information for management and develops financial models used in operational decision making. Oversees position justification, approves or denies staff additions, maintains position tracking and provides detailed personnel reporting to support staffing decisions.	D	40%
2. Researches, strategizes and applies analytical methods to solve complex problems. Interprets and explains complex federal, state and local laws pertaining to District spending. A subject matter expert regarding the assigned clients business in order to make unbiased and professional recommendations to all levels of management regarding revenue and expenditure projections, capital planning needs, and both short and long term financial forecasts. Throughout the process the senior financial analyst will identify areas for improvement and guide other staff in implementing change.	W	20%
3. Improves financial outcomes by developing models, reports and dashboards that elevate the level of reporting and analysis of key financial data that drive process improvements. Collaborate with the accounting team to ensure a smooth monthly close and accurate financial reporting. Collaborate with budget manager to ensure the annual budget is aligned with strategic objectives and operational initiatives.	M	15%
4. Key member of the Anaplan (budget software) modeling team. One of three individuals in the District that design and update the architecture of the software to meet all funding and expenditure budget and long range forecasting requirements. Train District staff on the development of individual budgets in the software platform and liaison with developer to provide additional educational support.	A	10%
5. Performs other job-related duties as assigned.	Ongoing	15%
	TOTAL =	100%

EDUCATION AND RELATED WORK EXPERIENCE:

- Bachelor’s degree in finance, business administration, public administration or related field required.
- Master’s degree preferred.
- Five (5) years of professional level experience analyzing budgets, financial statements, and management of financial information systems.
- Experience working for a governmental entity or similar public entity in a budgetary capacity preferred.
- School District experience preferred.

LICENSES, REGISTRATIONS or CERTIFICATIONS:

- Criminal background check required for hire.

TECHNICAL SKILLS, KNOWLEDGE & ABILITIES:

- Strong interpersonal, written and verbal communication and attention to detail skills
- Exceptional organizational skills.
- Critical thinking and problem solving skills.
- Ability to maintain confidentiality in all aspects of the job.
- Ability to manage multiple tasks and priorities with frequent interruptions.

- Ability to promote and follow Board of Education policies, District Policies and building and department procedures.
- Ability to communicate, interact and work effectively and cooperatively with all people including those from diverse ethnic and educational backgrounds.
- Ability to recognize the importance of safety in the workplace, follow safety rules, practice safe work habits, utilize appropriate safety equipment and report unsafe conditions to the appropriate administrator.
- Ability to stay current with district policy, standards and training in the areas of data quality, data privacy, and cybersecurity with respect to student and staff data, and related information systems.

MATERIALS AND EQUIPMENT OPERATING KNOWLEDGE:

- Operating knowledge of and experience with personal computers and peripherals.
- Operating knowledge of and experience with Microsoft Word, Windows, Excel, and PowerPoint.
- Operating knowledge of district financial system and student information system preferred, required within 3 months of entering position.
- Operating knowledge of and experience with typical office equipment.

REPORTING RELATIONSHIPS & DIRECTION/GUIDANCE:

	POSITION TITLE	JOB CODE
Reports to:	Budget Manager	3053

	POSITION TITLE	# of EMPLOYEES	JOB CODE
Direct reports:	This job has no direct supervisory responsibilities.		

BUDGET AND/OR RESOURCE RESPONSIBILITY:

- Responsibility for analyzing and monitoring budgets, maintaining and reconciling accounts.

PHYSICAL REQUIREMENTS & WORKING CONDITIONS: *The physical demands, work environment factors and mental functions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

PHYSICAL ACTIVITIES:	Amount of Time			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Stand		X		
Walk			X	
Sit				X
Use hands and fingers to handle and/or feel				X
Reach with hands and arms			X	
Climb or balance		X		
Stoop, kneel, crouch, or crawl		X		
Talk				X
Hear				X
Taste	X			
Smell	X			

WEIGHT and FORCE DEMANDS:	Amount of Time			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Up to 10 pounds			X	
Up to 25 pounds		X		
Up to 50 pounds	X			
50 to 100 pounds	X			
More than 100 pounds	X			

MENTAL FUNCTIONS:	Amount of Time			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Compare			X	
Analyze				X
Communicate				X
Copy		X		
Coordinate		X		
Instruct		X		
Compute				X
Synthesize			X	
Evaluate			X	
Interpersonal Skills				X
Compile				X

Negotiate		X		
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WORK ENVIRONMENT:	Amount of Time			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Wet or humid conditions (non-weather)	X			
Work near moving mechanical parts	X			
Work in high, precarious places	X			
Fumes or airborne particles	X			
Toxic or caustic chemicals	X			
Outdoor weather conditions	X			
Extreme cold (non-weather)	X			
Extreme heat (non-weather)	X			
Risk of electrical shock	X			
Work with explosives	X			
Risk of radiation	X			
Vibration	X			

VISION DEMANDS:	Required
No special vision requirements.	
Close vision (clear vision at 20 inches or less)	X
Distance vision (clear vision at 20 feet or more)	
Color vision (ability to identify and distinguish colors)	
Peripheral vision	
Depth perception	
Ability to adjust focus	

NOISE LEVEL:	Exposure Level
Very quiet	
Quiet	
Moderate	X
Loud	
Very Loud	