

BURBANK UNIFIED SCHOOL DISTRICT

CLASS TITLE: FINANCIAL ANALYST

BASIC FUNCTION:

Under the direction of an assigned supervisor, performs advanced level work related to procedures development and financial data analysis in areas of budget cash flow analysis, general ledger, projections of financial status, and related systems design. Provides service to schools and local district staff by performing complex fiscal and operational tasks, on-site visitations to train and troubleshoot, and analyze and interpret policies, procedures, and records related to school fiscal management including student body financial activities.

REPRESENTATIVE DUTIES:

Develop and maintain site and school budgets; review and analyze various budgets, expenditures and revenues; monitor site and department expenditures.

Participate in the development of the annual preliminary budget; analyze and review budgetary and financial data; control and authorize expenditures in accordance with established limitations.

Reviews a variety of rules, policies, and procedures in order to establish and maintain financial internal controls; analyzes governmental guidelines and proposed legislation to provide administrators with data on financial effects, which includes the preparation of complex Federal and State reports that validate funding levels.

Conducts complex studies in areas of budget, financial management, expenditure analysis, and cash flow analysis using the District's general ledger.

Maintains current status of District's financial position by reviewing expenditure data and maintaining records for funds received and to be received for current and future years.

Conducts studies and writes reports related to adjustments in policies, procedures, organization structure, cost effectiveness, communications, work methods, and needed support services.

May present reports regarding budgets, as well as current and anticipated financial conditions to board committees, administrators, and senior management.

Prepare and maintain a variety of narrative and statistical reports, records and files related to personnel and assigned activities; create and implement new forms, manuals, and financial spreadsheets/charts using various computer software programs.

Coordinate communication of Budget/Accounting activities with District sites and departments; confer with administrators and staff personnel and other agencies to develop

procedures for collecting and organizing data in estimating financial requirements for various programs.

Review rules, policies, and procedures and assist in training on recommended or established financial controls.

Communicate with administrators, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange budget information.

Serve as a liaison between schools and District staff by planning and conducting workshops, in-service training and site training.

Attend a variety of meetings and conferences including, but not limited to, SELPA and County meetings.

Perform other duties as assigned related to job description.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Accounting and auditing principles, practices and procedures.

Financial and statistical record-keeping principles.

Language and structure of contracts.

Oral and written communication skills.

State, Federal, Education Code, and other applicable laws, regulations, policies and procedures.

Modern office practices, procedures and equipment.

Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

Perform technical and complex accounting, budget and auditing work in the preparation, maintenance and review of District financial records, accounts and reports assuring compliance with applicable rules, regulations, policies and procedures.

Apply auditing and financial record-keeping principles.

Interpret, apply and explain rules, regulations, policies and procedures.

Operate a variety of office equipment.

Make arithmetic computations with speed and accuracy.

Establish and maintain cooperative and effective working relationships with others.

Analyze situations accurately and adopt an effective course of action.

Meet schedules and time lines.

Communicate effectively both orally and in writing.

Work independently with little direction.

Maintain and prepare records, reports and files.

Analyze statements, invoices and reports.

- Type at 30 words per minute from clear copy.
- Develop and maintain site and school budgets.
- Review and analyze budgets, expenditures and revenues.
- Monitor site and department expenditures.
- Approve requisitions, purchase orders and other expenditures in accordance with District policies and procedures.
- Plan and organize work.
- Prepare comprehensive narrative and statistical reports.

EDUCATION AND EXPERIENCE:

An associate degree in accounting, project accounting, business or business management, and three years governmental general ledger accounting and budget experience.

WORKING CONDITIONS:

- Office environment subject to frequent interruptions.
- Driving a vehicle to conduct work.
- Subject to exposure to communicable diseases.

Job Study-1/2020