



JOB DESCRIPTION

Fiscal Analyst



Reports to:	Executive Director of Fiscal Service	Employment Group / Salary Range:	Classified Confidential
Dept:	Fiscal Services	FLSA:	Non-Exempt
Annual Work Days	261	Formal Review Date: Board Approval Date:	6/23/23 7/10/23

PRIMARY FUNCTIONS

Under general supervision, performs professional accounting, budgeting and financial forecasting and analysis; prepares reports to aid in District planning; monitors and prepares budget and expenditure records and reports for general, categorical and grant-funded programs and services; works closely with other District personnel in budgeting and financial matters; and performs related duties as assigned.

ESSENTIAL DUTIES & RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

- Integrates and prepares budget projections and expenditure data used to prepare individual department and consolidated budget and expenditure reports; prepares budget projections, budget scenarios and development materials; compiles data, prepares tables and charts, drafts reports for use in fiscal planning and reporting.
- Provides advice and recommendations to executives, principals and managers on allowable sources and uses of funding to support various projects and activities, based on varied funding-source requirements and restrictions.
- Analyzes information regarding financial, enrollment, statistical, state and federal programs in order to prepare LCAP and budget recommendations and perform other fiscal planning activities.
- Analyzes statistical data, program requirements and contractual requirements; prepares a variety of quarterly, annual and final reports for assigned programs and grants, uploading data to funding source portals; may interact with funding source representatives on budget expenditure allocation and compliance issues.
- Coordinates fiscal accountability activities and audits with internal and external entities; prepares supporting work papers and provides other assistance.
- Assists in effective financial management to ensure District solvency and fiscal accountability.
- Compiles, evaluates and reconciles complex operating statements, final accounting for construction and other projects, and claims for reimbursement from other government agencies or private contractors.
- Conducts cost surveys, revenue analyses and accounting systems and procedural studies.

- Assists in reviewing Board actions for items that may impact the budget and makes appropriate recommendations.
- Works with fiscal and human resources information systems, coordinates and assists with new system implementations as they occur.
- Conducts surveys and compiles data from other districts, other governmental agencies and various school organizations.
- May assist in training staff; assists in developing procedures and processes.
- Performs related duties as assigned.

QUALIFICATIONS

Education and Experience:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

A bachelor's degree in business, accounting, economics or a related field and at least two years of recent experience in budgeting, accounting, auditing, financial forecasting or a similar job function; or an equivalent combination of experience and training.

Licenses, Certificates and Other Requirements:

- A valid California driver's license and the ability to maintain insurability under the District's vehicle insurance program may be required in some assignments.

KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Principles, practices, concepts and techniques used in fiscal administration in a K-12 educational environment.
- Generally Accepted Accounting Principles (GAAP); principles, practices, procedures and theories of accounting, with emphasis on governmental accounting.
- Principles, practices and procedures of auditing and budgeting.
- Research, statistical and forecasting methods used in accounting analysis and management.
- Federal, state and local laws, ordinances, codes, regulations and policies affecting accounting and financial systems.
- District rules, regulations and requirements related to fiscal services.

Skills and Abilities to:

- Ensure District budgets and expenditures are reported accurately and that information reported to state and federal entities are correct and reflective of District goals.
- Prepare and maintain financial and programmatic reports and other records related to District programs.

- Analyze financial, budgetary, procedural, operational and organizational problems, evaluate alternatives and reach sound, logical, fact-based conclusions, projections and recommendations.
- Collect, evaluate and interpret appropriate and applicable data, either in statistical or narrative form.
- Interpret and prepare complex financial reports.
- Work confidentially with discretion.
- Communicate effectively, both orally and in writing.
- Understand and follow written and oral instructions.
- Operate a computer and use standard business software.
- Establish and maintain cooperative and effective working relationships with federal, state and local agencies, as well as at the District level.
- Understand and be sensitive to and respectful of the diverse academic, socioeconomic, cultural, disability, and ethnic backgrounds of students, faculty and staff.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Physical Demands:

While performing the duties of this class, employees are regularly required to talk or hear, in person and by telephone; sit, walk and stand; use hands to finger, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is frequently required to lift up to 10 pounds. Specific vision abilities required by this job include close vision and the ability to adjust focus.

Mental Demands:

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; use math and mathematical reasoning; observe and interpret people and situations; learn and apply new information and skills; perform highly detailed work; work on multiple, concurrent tasks; work with frequent interruptions and under intensive deadlines.

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Employees work under typical office conditions subject to frequent public contact and interruption and to intermittent exposure to individuals acting in a disagreeable fashion.

The employee may be required to travel to locations other than assigned work site and to adjust to work schedule changes and requirements to work overtime.

EMPLOYEE CERTIFICATION OF JOB DESCRIPTION

I hereby acknowledge I have read and understand the content of this job description. I have had the opportunity to ask questions and have those questions answered about the general duties and responsibilities of this job. I understand that the job description may be revised from time to time in the future by the Patterson Joint Unified School District Governing Board in consultation with my professional association as needed and where applicable.

I understand and agree nothing in this job description should be construed as a contract of employment. My employment with the Patterson Joint Unified School District is contingent upon execution of a signed contract approved by the board of trustees. Continued employment is subject to my adherence to board policy, state and federal laws, the collective bargaining agreement between my association and the district where applicable, and my performance evaluation.

I further acknowledge that it is my responsibility to notify my supervisor immediately in the event I may need reasonable accommodations to perform the primary functions, general duties and responsibilities, or the physical, mental and social requirements of this job.

Employee Signature

Date

Name Printed