



**CLASSIFIED
Job Class Description**

Equal Employment
Opportunity

LEAD ACCOUNTING ANALYST

DEPARTMENT/SITE: BUSINESS SERVICES

Salary Schedule: Classified

Level: Range 75

Work Year: 12 Months

**REPORTS TO: ASSISTANT SUPERINTENDENT,
BUSINESS SERVICES**

Date Current Job Description Approved:

Board of Education effective: May 13, 2026

JOB GOAL/PURPOSE

Under the supervision and direction of the Assistant Superintendent, Business Services, to serve as the primary point of contact for the district’s fiscal operations. Leads budget analysis and development; verification and maintenance of proper financial coding pursuant to Standard Account Code Structure (SACS) and budget controls, and in accordance with all Federal, State, District, and local laws, policies; supports accounting and other school business functions such as accounts payable and/or receivable. Incumbents in this classification provide accurate and timely financial, accounting, and business-process information, which, in turn, directly supports student learning.

DISTINGUISHING CHARACTERISTICS

This is an advanced-level technical and specialized classification responsible for performing complex functions and in-depth analysis of district fiscal operations and lifecycle management of resources. As the functional expert in resource management, this position can synthesize data independently, seek and compile information, and make accurate projections with minimal supervision. This position coordinates efforts of other financial personnel to ensure completion and is able to ensure accuracy of payments in a timely manner. Demonstrates initiative and judgement, dedication to sound financial management, and ability to work well with others throughout the organization.

ESSENTIAL FUNCTIONS, TASKS, AND DUTIES

- Coordinate and execute year-end closing duties; coordinate and conduct annual audits to assure compliance with established fiscal standards and requirements; coordinate, assist, and provide fiscal information to outside auditors as directed; prepare and distribute financial data to auditors; and develop and implement modifications to accounting systems as needed.
- Develop District budgets, including the monitoring of budget revenues and expenditures to verify revenue and expenditures are in compliance with projected levels; recommend, prepare, and oversee budget revisions; analyze data related to District budget preparation or special projects; perform fiscal and program analyses and make recommendations as appropriate.
- Prepare the adopted budget, interim reports, the consolidated application, and other financial reports; coordinate the preparation and maintenance of various narrative and statistical reports, records, and files related to assigned activities.
- Monitor the use of categorical and other District funds to ensure appropriate use, accurate allocations, and compliance with fiscal constraints.
- Communicate with other administrators, personnel, and outside organizations to coordinate activities and programs, resolve issues and conflicts, and exchange information.
- Monitor budgets and expenditures of all District funds, including Bond and Community Facilities District funds, ensuring that allocations are accurate, related revenues are generated, expenses are within budget, and fiscal practices are followed.
- Assure compliance with State and Federal regulations, and District policies; recommend budget policies that will enable the district to have adequate budgetary/staffing control and comply with state requirements.
- Direct, maintain, and monitor capital assets and their accounting.
- Provide technical expertise and guidance to administrators and staff on budgetary and accounting matters, standards, and procedures.
- Assist in the development, planning, and preparation of categorical, school site, and District-wide budgets, including forecasting and expenditure analysis.
- Oversee financial recordkeeping, reporting, and auditing functions to ensure timely and accurate accounting of District funds.
- Perform detailed account analysis, including posting, reconciling, adjusting entries, and budget transfers.
- Research and resolve discrepancies by reviewing, analyzing, and reconciling ledgers, statements, and reports.
- Attend meetings, workshops, seminars, and proceedings on the District's behalf.
- Perform financial record-keeping operations related to the District's various accounting and record-keeping systems and procedures.
- Monitor and record developer fees and Mello Roos taxes, and prepare accounts for reporting on activities and costs associated with facilities and construction finances.
- Train department and school personnel on SACS and the financial information system for the purpose of providing information on the operation and maintenance of the District's financial information.
- Administer various capital facility funds, community facilities districts, certificates of compliance and participation and San Diego County Treasury portal wire transfers to ensure accuracy and availability for authorized use and conformance to applicable statutes.

- Perform other duties and tasks related to this class as assigned.

JOB QUALIFICATIONS /REQUIREMENTS

(At time of application.)

Knowledge of:

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- Advanced specialized professional knowledge of theory, principles, and procedures of accounting, auditing, and finance for the education and public sector
- In-depth knowledge of the principles and procedures used in budget preparations, accounting administration, statistical analysis, current accounting techniques, methodologies, and practices, and internal control
- Advanced math skills to perform business and statistical calculations
- Methods, practices, and terminology used in fund accounting and school business financial record keeping.
- Computer software, including Google Workspace for Education, Microsoft Excel, Word and the County Office of Education financial system (currently Oracle/Peoplesoft HCM Financial Software)
- Telephone techniques and etiquette
- Interpersonal skills, including use of tact, patience, confidentiality, and courtesy

Skills:

- Keyboarding accurately at an acceptable rate of speed
- Use a 10-key calculator accurately at an acceptable rate of speed
- Operate standard office equipment, including use of District-issued computer and District-adopted computer applications and systems (currently includes Microsoft Excel, Word, email, Oracle/Peoplesoft HCM Financial Software, Safari/Firefox, etc.)
- Advanced use of Microsoft Excel to create and maintain complex spreadsheets with formulas and other functions used to track and calculate financial, accounting, and other business data.
- Use correct spelling, grammar, and punctuation
- Perform basic arithmetic calculations quickly and accurately
- Organize, prioritize, and multitask work assignments and deadlines within short timelines and high volume

Ability to:

- Gather, analyze, and present data with minimal guidance in a timely and professional manner
- Meet demanding schedules and timelines
- Prepare financial and budget reports required by the State, administration, federal agencies, and the Board.
- Analyze complex and technical financial documents and budgets.
- Work independently with little direction.
- Direct the maintenance of a variety of reports and files related to assigned activities.
- Work efficiently under pressure with constant interruptions
- Understand and interpret rules and written standards

- Be well-organized and detail-oriented
- Maintain good customer service relations with District employees
- Meet deadlines and schedules; carry out oral and written instructions
- Establish and maintain effective working relationships with others

EDUCATION REQUIRED

A combination of education, training, and experience equivalent to a Bachelor's Degree in accounting, business administration, finance, or a related field that provides the required knowledge and abilities will be considered.

EXPERIENCE REQUIRED

Three (3) years of progressively responsible accounting experience, including experience in professional governmental accounting or auditing, with at least one year performing complex reporting, analyses of accounts, and financial operations. Lead or supervisory experience and experience in a public school district or other public agency environment are highly desirable.

LICENSE(S) REQUIRED

Regular travel to other sites will be required to perform assigned duties. Must have reliable means of transportation during work hours.

CERTIFICATIONS AND TESTING REQUIRED

Pass the District's applicable proficiency exam (e.g., written test, oral interview, and/or work sample) for the job class with a satisfactory score.

- After offer of employment, obtain:
 - Criminal Justice and FBI Fingerprint Clearance
 - Negative pre-employment drug screen test at District's expense
 - Pre-employment physical exam at District's expense
 - Negative TB test result plus periodic post-employment retest as required (currently every four years)

WORK ENVIRONMENT/PHYSICAL DEMANDS

(Must be performed with or without reasonable accommodations)

- Work is primarily indoors in an office environment and requires sitting for extended periods
- Dexterity of hands and fingers to operate a computer keyboard and other office equipment and maintain paper files and documents
- Lifts objects such as boxes containing documents and weighing up to 35 pounds
- Kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies
- Hearing and speaking to exchange information in person or on the telephone
- Visual acuity to see/read documents and the computer screen
- Incumbents may be exposed to intermittent noise and frequent interruptions
- Occasional operation of a vehicle to travel within and outside the district for meetings, training sessions, and assisting staff at school sites, and/or additional duties