



**Orange County Department of Education
Human Resources Department
Classified Management Class Specification**

Financial Analyst

**Class Code: 1406
Work Days: 225**

GENERAL PURPOSE

Perform a variety of high level analytical, complex, and technical duties to assist the organization in the effective management, implementation, and maintenance of budget and financial reporting.

SUPERVISION RECEIVED AND EXERCISED

1. Receives direction from higher level management staff.
2. May exercise direct supervision over professional, technical, and clerical staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

1. Recommend and assist in the implementation of goals, objectives, and strategic plan; establish schedules and methods for providing specialized services; implement policies and procedures.
 2. Assist programs to maintain an effective financial management process; discuss fiscal issues and recommend adjustments to management and program staff; serve as a liaison between project accountants, managers, administrators, directors, local agencies, and the California Department of Education.
 3. Act as a resource to Administrators and staff related to financial and budget guidelines, accounting procedures, program requirements, definitions, and financial applications and operations.
 4. Interpret, study, plan, research, and evaluate projected budget and financial industry trends. Develop and recommend effective and appropriate financial methods, techniques, and procedures for measuring and evaluating budget and financial performance. Develop new capabilities for the improvement of processes and effectiveness in projecting revenue and expenditures.
 5. Analyze budget and financial reports obtained from various departments within the organization. Review, input, consolidate, balance, analyze, and monitor budget and financial data. Audit, review, reconcile, and maintain records of accounting transactions. Monitor accounting reconciliations and procedures.
-

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

6. Prepare preliminary, adopted, interim, and final budgets; develop budgets for individual programs; project income and expenditures; review budgets with program administrators to ensure compatibility with program goals and requirements.
7. Analyze, examine, and assist in effective decision making to ensure proper financial compliance with program goals and requirements. Evaluate proposed budgets with comprehensive analysis of financial impact. Using statistical information and spreadsheets gather, examine, and analyze financial data and prepare reports.
8. Compile and prepare multi-year projection reports; compare current and prior year financial data and analyze variances; evaluate projected revenue and expenditures; analyze and conduct research of financial and statistical data, recommend adjustments.
9. Comply with California Standardized Accounting Code Structure (SACS). Using SACS prepare and submit a variety of complex budget and financial reports and printouts. Review and monitor accounting resources, goals, and functions to ensure compliance with federal, state, local laws, codes, and regulations. Review, verify, balance, and analyze transfer of funds for legality and compliance with state education codes.
10. Assist in the planning and implementation of financial reporting applications.
11. Demonstrate attendance sufficient to complete the duties of the position as required.
12. Perform related duties similar to the above in scope and function as required.

QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)

Knowledge of:

1. Principles and practices of accounting and budgeting.
2. Principles, methods, and practices of statistics and financial analysis.
3. Principles of advanced budget analysis and forecasting.
4. Federal, state, and local laws, codes, and regulations affecting assigned work areas.
5. Operation and application of automated systems relative to business and statistical use.
6. Business letter writing and basic report preparation.

Ability and Skill to:

1. Compile, analyze, interpret, and report research findings.
2. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.
3. Establish and maintain effective working relationships with various constituencies.
4. Understand, interpret, and explain laws, codes, contracts, regulations, policies, and procedures.
5. Prepare clear and concise correspondence, reports, and other written materials.

Ability and Skill to (cont.):

6. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
7. Communicate clearly and concisely, both orally and in writing, in English; present information effectively in front of both large and small groups.

Education, Training and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is Bachelor's degree from an accredited college or university with major course work in accounting, finance, business, public administration, or a related field, and four years of responsible finance, budgeting, accounting, or related experience.

PHYSICAL AND MENTAL DEMANDS

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

Physical Demands

While performing the duties of this job, employees are regularly required to bend, stoop, push, pull, grasp, squat, twist, kneel, walk, sit, and reach to access materials or equipment and complete other tasks as assigned; lift and carry up to 25 pounds; and lift from ground, waist, chest, shoulder, and above shoulder level. The position may include occasional need to traverse uneven surfaces.

Employees in this classification are to be able to travel countywide to a variety of sites within a reasonable time frame; read written and electronic materials; communicate clearly in person, on the phone, and via email; and operate all required equipment.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

WORK 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 individuals with disabilities to perform the essential functions.

Employee typically works in an office environment that is moderately paced with moderate to high pressure.

Revised 3/2017