



## **DISTRICT FINANCIAL ANALYST, LEAD**

### **DEFINITION**

Under general direction, in collaboration with the Director of Budget Operations leads the development and administration of the District's budget in accordance with sound fiscal management principles, established District policies, and applicable state laws, codes, and regulations; coordinates District budget processes; performs a variety of complex budget and financial analysis and provides technical expertise and direction to District administration, staff, and others regarding budget administration; and performs related duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives direction from the Director of Budget Operations. Exercises technical and functional direction and provides training to other staff.

### **CLASS CHARACTERISTICS**

This is an advanced journey-level class responsible for taking lead responsibility for development and administration of the District budget and preparing, reviewing, reconciling, and analyzing financial and budget reports. Responsibilities include performing diverse, specialized, and complex financial and budget analyses involving significant accountability and decision-making responsibility and considerable discretion and independent judgment in performing assigned work. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products or services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. Successful performance of the work requires an extensive knowledge of fiscal management principles, established District policies, and applicable state laws, codes, and regulations, as well as the ability to coordinate work with that of other units and outside agencies

### **EXAMPLES OF TYPICAL FUNCTIONS (Illustrative Only)**

- Serves as a lead resource and technical advisor to District and campus administrators and staff on budget development and administration processes, policies, and procedures.
- Performs the full range of complex budget and financial analysis involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned budgets and programs.
- Performs variance analysis and financial modeling; prepares reports including narrative discussions, analysis, and interpretation of financial data and budget issues.
- Researches, analyzes, and summarizes various data including general ledger, human resources, and other financial and statistical data; presents findings and recommendations to management.
- Prepares financial and budget documents and reports including agenda materials for presentation to the Board of Trustees.
- Prepares, audits, and processes budget, journal entries, and year-round accruals; prepares and processes claims for reimbursement, expense transfers, and related transactions.

- Reviews current status of assigned budgets, programs, and revenues and expenditures; monitors expenditures and fiscal activities to ensure appropriate use of funds and compliance with appropriate financial guidelines; notifies the Director of potential issues, recommends resolutions, and prepares appropriate documentation for budget adjustments.
- Provides technical expertise and direction to budget and program managers, District and campus administrators, and staff on budget and accounting issues, financial reports, and budget changes and transfers.
- Maintains assigned data management systems; monitors data for accuracy and compliance with federal and state regulations and District policies and procedures; develops queries and creates special and ad hoc reports; collaborates with District Educational Technology Services (ETS) on troubleshooting system issues.
- Identifies, researches, analyzes, and recommends solutions to various complex budgetary and accounting problems; performs complex financial analysis and forecasting as assigned.
- Participates in year-end fiscal closing activities.
- Provides direction, training, orientation, and guidance to assigned staff; plans, schedules, prioritizes, and assigns work.
- Responds to inquiries and requests for information; interprets and applies regulations, policies, procedures, systems, rules, and precedents in response to inquiries and requests.
- Stays abreast of new trends and innovations in the field of budget and fiscal management; analyzes and monitors District budget procedures to ensure compliance with changes in Board policies, Education Code provisions, and other state, federal, and local regulations; makes recommendations for procedural changes and implements changes after approval.
- Performs related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Applicable federal, state, and local laws, rules, regulations, ordinances, and District policies and procedures relevant to assigned area of responsibility including State Budget and Accounting Manual and California Education Code.
- Generally accepted accounting principles.
- Principles of budget preparation, analysis, and monitoring.
- Methods and techniques of auditing, verifying, balancing, and reconciling accounting records.
- Principles and techniques of conducting analytical studies, evaluating alternatives, making sound recommendations, and preparing and presenting effective and technical reports.
- Principles, practices, and technologies used in the maintenance of financial data management systems.
- Principles and practices of data collection and analysis and report preparation.
- Basic principles and practices of employee supervision.
- Principles and practices of fiscal, statistical, and administrative record keeping and reporting.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Modern office practices, methods, and computer equipment and software relevant to work performed.
- Techniques for providing a high level of customer service by effectively dealing with the public, students, and District staff, including individuals of diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation.

Ability to:

- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation of community college students, faculty and staff.
- Interpret, apply, explain, and ensure compliance with applicable federal, state, and local laws, rules, regulations, and District policies and procedures relevant to assigned area of responsibility.
- Implement and coordinate assigned programs, projects, and activities in an independent and cooperative manner, evaluate alternatives, make sound recommendations, and prepare reports.
- Plan, organize, and carry out assignments from management staff with minimal direction.
- Perform a variety of professional accounting and financial and budget analysis involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned budgets.
- Lead and provide technical advice in the development and implementation of budgets.
- Prepare and analyze comprehensive financial statements and reports.
- Analyze, interpret, summarize, and present information and data in an effective manner and draw sound conclusions.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Plan, organize, schedule, assign, train, and review the work of assigned staff.
- Organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software, and modern business equipment to perform a variety of work tasks.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

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

Equivalent to graduation from an accredited four-year college or university with major coursework in accounting, finance, business administration, or directly related field, and five (5) years of increasingly responsible accounting or budget analysis experience.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification

frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds with the use of proper equipment. Reasonable accommodations will be made for individuals on a case-by-case basis. Reasonable accommodations will be made for individuals on a case-by-case basis.

#### ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

**Salary Grade:** C5-16

**FLSA:** Non-Exempt

**EEO Code:** H-30

**Board Approved:** April 2021