

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:

Reviews a variety of rules, policies, and procedures in order to establish and maintain financial internal controls.

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

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.

Confers with administrators and staff personnel and other agencies to develop procedures for collecting and organizing data in estimating financial requirements for various programs.

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.

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

Creates and implements new forms, manuals, and financial spreadsheets/charts using various computer software programs.

Coordinate communication of Budget/Accounting activities with District sites and departments.

Review of rules, policies, and procedures and assist in training in order to recommend or establish and maintain financial controls.

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

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Accounting and auditing principles, practices and procedures.
Financial and statistical record-keeping principles.
Modern office practices, procedures and equipment.
Applicable sections of State Education Code and other applicable laws.
Interpersonal skills using tact, patience and courtesy.
Operation of computer terminal.
Technical aspects of field of specialty.
Oral and written communication skills.

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 and machines such as computer hardware, typewriter and calculator.
Make arithmetic computations expeditiously and accurately.
Work cooperatively and effectively with others.
Work confidentially with discretion.
Analyze situations accurately and adopt an effective course of action.
Meet schedules and timelines.
Communicate effectively both orally and in writing.
Work independently with little direction.
Maintain records and prepare reports.
Analyze statements, invoices and reports.
Type at 30 words per minute from clear copy.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: two years college-level course work in accounting and three years governmental general ledger accounting and budget experience.

WORKING CONDITIONS:

Typical office environment.