

ELK GROVE UNIFIED SCHOOL DISTRICT

CLASS TITLE: FINANCIAL ANALYST - FACILITIES

BASIC FUNCTION:

Under the direction of an assigned administrator, perform a variety of independent technical and analytical duties in the areas of budgetary analysis and development, accounting, and financial management. Employees in this job classification report to the Chief Financial Officer or designee and are responsible for exercising independent judgment and decision-making abilities regarding standard accounting procedures for the District.

ESSENTIAL FUNCTIONS

Perform difficult professional budgetary and accounting duties in the maintenance of all assigned budgets and financial records.

Plan and perform a variety of complex budget and fiscal simulations, analyses, and calculations.

Implement program budget revisions in accordance with designated specifications.

Coordinate planning, financing, scheduling, implementing and reporting of bond-financed construction projects.

Coordinate department input into bond financing authorizations and sales, including the development of relationships with financial advisors, rating agencies, underwriting firms, bond counsels, and bond trustees; may manage debt issuance.

Direct the preparation, review, and distribution of detailed and complex capital project financial analyses and management reports that provide information on status of budget/expenditure, appropriations, source/availability, and projected revenues and expenditures.

Work with administrators and staff to facilitate staff training in the development, implementation, and revision of budgets and related financial matters.

Initiate, complete, evaluate, and validate a variety of State, Local, and Federal reports and financial statements.

Develop recommended Board Policies, Administrative Regulations, and Systems and Procedures for fiscal management.

Perform financial and operations audits as assigned.

Analyze financial and budgetary statements; identify trends and concerns with recommended solutions.

Communicate with various departments and outside agencies to assure compliance, resolve issues or concerns, and exchange information.

Analyze and evaluate automated financial systems designs, computer-generated financial reports, and other automated programs integrated with the primary financial system.

Prepare special financial reports and statistical analyses as directed including cash flow, legality of expenditures, and budget procedures.

Develop and maintain comprehensive statistical data; prepare periodic budgetary reports and statements.

Assist in preparing financial statements and other statistical reports as necessary.

Assist with budget preparation, revision, and transfers throughout the year.

Verify balances and adjust accounts.

Act as information source regarding assigned financial operations in the Facilities and Planning Department.

Provide work direction and guidance to assigned personnel.

Assist in the training of other assigned staff.

Perform research and data gathering and analysis.

Prepare oral and written reports.

Perform related duties as assigned.

DEMONSTRATED KNOWLEDGE AND ABILITIES

KNOWLEDGE OF:

Accounting principles and practices.

Laws and regulations related to District accounting and budgeting.

Principles of training and providing work direction to other assigned personnel.

Proper office methods, procedures, and terminology used in financial and statistical record keeping and reporting.

Operation of computer terminal, 10-key, calculator, and standard office equipment.

Methods of procedures used in government funding.

Computer technology and techniques of utilizing financial, accounting, database query, and reporting software.

Oral and written skills.

District organization, operations, and policies and objectives.

ABILITY TO:

Meet District standards of professional attitude and effective leadership.

Demonstrate proficiency in the use of microcomputers including electronic spreadsheet and data base utilization.

Perform assigned functions without supervision.

Analyze, interpret, and prepare financial statements and reports.

Maintain accurate financial and statistical records.

Perform arithmetical calculations rapidly and accurately.

Perform technical accounting duties related to assigned fiscal programs and activities.
Establish and maintain complex financial records.
Analyze accounting and financial data and prepare clear and accurate financial statements and reports.
Learn and apply provisions of the Educational Code, School Accounting Manual, and other State and Federal Regulations.
Establish and maintain cooperative and effective working relationships with others.
Train and provide work direction to others.
Maintain confidentiality of sensitive and privileged information.
Maintain consistent, punctual and regular attendance.
See to read a variety of materials.
Hear and speak to exchange information in person and on the telephone.
Walk, twist, reach, kneel, and sit for extended periods of time, on occasion.
Grasp and/or manipulate objects, operate mechanical equipment, and move about the work area.
Operate a variety of machines and equipment, including computer and calculator.
Perform statistical typing accurately.
Work independently with little direction.
Meet schedules and timelines.
Be bonded.

EXPERIENCE AND EDUCATION:

Any combination equivalent to bachelor's degree in accounting, finance, business administration, or closely related field and/or three years professional experience in accounting, budgeting, and/or financial management, and/or closely related field.

WORKING CONDITIONS:

ENVIRONMENT:
Office environment.

BOARD APPROVED: July 19, 2022