

ELK GROVE UNIFIED SCHOOL DISTRICT

CLASS TITLE: SENIOR FINANCIAL DATA ANALYST

BASIC FUNCTION:

Under the direction of the Director of Fiscal Services and Director of Classified Personnel, perform highly responsible and professional financial data analytical duties related to personnel, compensation, benefits, accounting and budget; review, make recommendations and/or develop reporting options for the effective use of the District's financial and personnel systems; serve as a technical expert and resource to users of the District's financial and personnel systems; may serve a project leader in providing training and support of various aspects of the District's financial and personnel systems; document and report a variety of technical and analytical data; prepare assigned reports and calculations required by the Federal, State, and County agencies; prepare assigned reports and calculations required by District administration and the Board of Education; ensure compliance with applicable laws, codes, rules and regulations.

DISTINGUISHING CHARACTERISTICS:

The Senior Financial Data Analyst develops, implements and completes various reports and functions associated with data from the District's financial and personnel systems while working closely with management and staff. The Senior Financial Data Analyst works independently under the direction of the assigned supervisor. The Senior Financial Data Analyst serves as a liaison between Technology Services and District departments in relation to the financial and personnel systems of the District.

ESSENTIAL FUNCTIONS:

Conduct research, analyze and prepare data relative to personnel, compensation, benefits, accounting and budget information.

Coordinate with appropriate staff in Accounting, Budget, Compensation & Benefits, Human Resources, Fiscal Services, Finance & School Support and Technology Services in matters pertaining to the District's financial and personnel systems.

Attend a variety of meetings and conferences as assigned.

Perform special research and projects as assigned.

Assist users in the development and documentation of requirements for new systems or changes to existing systems; discuss user problems and test possible solutions.

Analyze user needs and system requirements of the District's financial and personnel systems.

Assist Technology Services with generating system design specifications and program design specifications for new systems and modifications according to standard formats.

Assist Technology Services with performing detail program design to meet system design requirements and programming specifications.

Assist users in conducting tests of systems and programs; assure proper system function and report problems to supervisor.

Provide periodic written reports.

Communicate with users and support staff of the District financial and personnel systems.

Assist with generating and implementing plans for migration of legacy systems to new technology client server systems.

Conduct regular meetings with user departments to develop new system specifications, prototypes, and discuss user support issues.

Assists users in conducting tests of systems and programs; assures proper system function and report any discrepancies to supervisor.

Participate in interview panels.

Prepare complex reports, records and correspondence; perform special projects and research as assigned.

Train and supervise the performance of assigned personnel; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions.

Attend a variety of meetings, workshops and conferences to maintain current knowledge of laws, codes, rules and regulations; provide resources for administrators and supervisors.

Operate a variety of office equipment including a computer and assigned software.

Prepare and provide monthly and periodic reports as required.

Assist with activities related to fiscal year transition, year-end closing and audits of the financial records of the district.

Analyze and review financial data; identify discrepancies of financial information.

Compile financial and statistical data; prepare related reports and submit to local, County, State, Federal and other agencies.

Plan, organize and assist with implementation of long and short-term projects and activities related to personnel and payroll, such as Affordable Care Act and other mandated or required activities.

Perform research and participate in the preparation of a variety of financial and statistical reports related to assigned activities and required by the State, Federal agencies, administration and the Board of Education.

Provide technical expertise, information and assistance as requested to the Associate Superintendent of Human Resources, Associate Superintendent of Finance and School Support, Director of Fiscal Services, Directors of Human Resources, and Director of Budget regarding matters relating to financial data.

Communicate with all levels of District personnel, outside organizations, auditors and other related positions to perform essential functions, resolve issues and conflicts and to exchange information.

Perform related duties as assigned.

DEMONSTRATED KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Interpersonal skills using tact, patience and courtesy.

Capabilities, operation and utilization of computer systems and related equipment.

Systems and procedures analysis and development.

Methods and practices of accounting, budget, payroll, human resources, and financial reporting.

Bargaining unit contracts and Board policies.

California School Accounting Manual rules and procedures.

Financial and statistical record-keeping and report preparation techniques.

Oral and written communication skills.

Applicable laws, codes, regulations, policies and procedures.

Modern office practices, procedures and equipment.

Mathematical computations.

ABILITY TO:

Plan, organize and assist in coordination of the collection and reporting of District financial data.

Analyze and report on financial and personnel data and work collaboratively with others to resolve issues.

Prepare financial reports required by the State, Federal agencies, administration, and the Board of Education.

Meets schedules and timelines.

Communicate effectively both orally and in writing.

Interpret, apply and explain rules, regulations, policies and procedures.

Establish and maintain cooperative and effective working relationships with others.

Operate a computer and assigned office equipment.

Analyze situations accurately and adopt an effective course of action.

Work independently with little direction.

Plan and organize work.

Maintain files related to assigned activities.

Maintain consistent, punctual and regular attendance.

Hear and speak to exchange information and make presentations.

Move hands and fingers to operate a computer keyboard.

See to read a variety of materials.

EDUCATION AND EXPERIENCE REQUIRED:

Any combination of training and experience equivalent to completion of an advanced degree in Business, Finance, Accounting or Business Administration and a minimum of five years of increasingly responsible experience in school district human resources, payroll and fiscal accounting.

LICENSES AND OTHER REQUIREMENTS:

Valid California Class C driver's license.

Preferred knowledge of the District's financial and personnel systems.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

Frequent interruptions.

Driving a vehicle to conduct work.

Operate a computer and assigned office equipment.

BOARD APPROVED: March 15, 2016