

## **CONFIDENTIAL FINANCIAL ANALYST**

### **DEFINITION**

Under direction of senior management, performs budgetary and financial analysis. Assists in the preparation of critical financial and personnel related information required for collective bargaining planning, cost analysis and implementation. Participates in the design, implementation, and evaluation of integrated budget, accounting, human resources and management reporting systems. Prepares periodic and special reports containing descriptive and analytical content related to the District's financial and human resources activities.

### **TYPICAL DUTIES**

Gathers, compiles and analyzes data and prepares periodic and special reports related to the business, human resources, and operational activities of the District. Primary emphasis is on analysis for collective bargaining proposals and assisting with the implementation of contractual provisions related to salaries and benefits. Maintains work calendars and salary schedules for all bargaining units. Conducts studies related to budgeting, finance and economic analysis. Creates and administers queries in PeopleSoft or other systems to perform analysis and develop studies. May assist with analyzing proposed legislation and regulations, codes and other external requirements to determine financial impact on the District. Assists in the development and review of the District's annual budget. Reviews budget requests for organizational units. Works with administrators and staff on matters related to budget planning and analysis and on collective bargaining research. Develops and distributes reports as required by collective bargaining agreements as well as ad hoc reporting for internal and external purposes. Develops staffing and other budget projections. Performs statistical analysis. Prepares standard benefits rates. Reviews external and internal financial reports prepared by staff. May serve as a liaison to District Information Technology department for administrative systems. Prepares board agenda items including development of supporting data.

### **QUALIFICATIONS**

#### **EXPERIENCE**

Three years of progressively responsible experience in a business, human resources, or financial environment, preferably in a school district or public agency.

#### **EDUCATION**

Bachelor's degree from an accredited institution in business, public administration, accounting, finance, economics, management or a related field; **OR**, a Bachelor's degree from an accredited institution in any area **AND** one additional year of qualifying experience.

#### **KNOWLEDGE OF**

Principles, practices, methods, and systems of budgetary and financial management; Principles, concepts and theories of accounting and public human resources administration; Federal, State and local laws, ordinances, codes, regulations, policies and procedures governing the financial management of the District. Appropriate and sound internal control procedures and processes in a business environment; Research, statistical and forecasting methods used in financial management; capabilities of computer applications in the management and reporting of financial and human resources related data; technical report writing; website design and maintenance; use of PeopleSoft or similar system.

**ABILITY TO (ESSENTIAL FUNCTIONS)**

Plan, organize, and develop detailed processes for reporting and tracking financial data. Ability to analyze and evaluate financial and statistical data and trends; interpret laws, rules and regulations related to business activities; identify problems, reason logically and develop effective solutions. Ability to develop, implement and modify budget and financial plans to meet District objectives; prepare comprehensive and concise reports; express complex concepts effectively in oral and written form and work effectively with others.