

## ORANGE UNIFIED SCHOOL DISTRICT

### FINANCIAL ANALYST

#### DEFINITION

Under direction, to plan, organize, monitor, audit, coordinate and participate in the technical and responsible accounting and fiscal analysis functions pertaining to the District financial and statistical records; to plan, organize and perform accounting and budget analyses and prepare reports concerning special accounts and funds; to perform a variety of internal audit and analysis functions; to perform specialized and complex accounting and financial analysis functions; and to do other related work as required.

#### DISTINGUISHING CHARACTERISTICS

This position classification requires professional level accounting work in establishing, analyzing, auditing, reconciling and maintaining District-wide financials records. The District's Financial Analyst will be responsible to prepare complex accounting, budgetary reports, statements and claims and must be able to provide recommendations for the establishment and revision of accounting procedures. Individuals in this classification may be assigned supervisory responsibility for clerical staff who perform related duties.

#### ESSENTIAL DUTIES:

- Perform financial and statistical record management analysis functions, including special budgets, special funds and accounts;
- Assist and aid accounting and budget personnel in assembling, tabulating, calculating, verifying and developing financial and statistical data;
- Plan, organize and coordinate the revision, formulation and implementation of financial, accounting and statistical record management systems and procedures;
- Plan, organize and coordinate the preparation of financially related management reports;
- Analyze, audit and verify the accuracy of various financial and statistical reports and records;
- Plan, organize and schedule the preparation of graphic fiscal and statistical records and reports to ensure the communication of the District projected income and budgetary position;
- Plan, organize, and perform technical and responsible tasks related to the preparation and management of financial and statistical records and reports;
- Research comparative cost analyses and interpret the analyses and findings;
- Performs other duties as assigned and required by Supervisor/Management in order to accomplish the objectives of the position and the goals of the District.

#### QUALIFICATIONS:

##### Knowledge of:

- Principles and methods of accounting, budget planning and control, cost analyses, technical report preparation and internal audit processes;
- Financial record management methods, procedures and techniques;
- California school accounting legal mandates, practices and procedures;
- Accounting, budget control, and statistical computer-based record management and information systems;
- Personal computer and related software including advanced MS Excel, QSS and SACS; Advanced Business Mathematics.

## ORANGE UNIFIED SCHOOL DISTRICT

### **FINANCIAL ANALYST – Page 2 of 2**

#### Ability to:

- Interpret and effectively communicate accounting, budget control, financial related policies, regulations and guidelines;
- Prepare clear and accurate financial and statistical management related reports;
- Perform complex and technical financial and statistical record management functions;
- Operate a calculator by touch;
- Operate a personal computer and related software including QSS and the ability to create complex spreadsheets using MS Excel and presentations using Powerpoint;
- Use data and operate within the SACS software developed by the State;
- Understand and carry out oral and written directions;
- Establish and maintain cooperative working relationships with those contacted in the course of work.

#### **PHYSICAL DEMANDS:**

This position classification performs light work that involves sitting a major portion of the time, but does require walking and standing for periods of time. Positions in this class require mobility of arms to reach and dexterity of hands to grasp and manipulate small objects. Lower body mobility may not be required. Individuals in this class require vision (which may be corrected) to read small print, accurate perceiving of sound, dexterity in working with business machines, materials and objects.

Reasonable accommodation may be made to enable a person with a disability to perform the essential functions of the position.

#### **EXPERIENCE AND EDUCATION:**

A typical way to obtain the requisite qualifications to perform the duties of this class is as follows:

Education and Experience: A bachelor's degree from an accredited college or university with major coursework in accounting/business or a related field is required. A minimum of two year's work experience in financial accounting, budget and analysis is required.

License Requirement: Possession of a valid California Motor Vehicle Driver's License.

Condition of Employment: Insurability by the District's liability insurance carrier.

Other: Incumbents of positions in this class may be required to use a personal vehicle in the course of employment, and may be required to attend periodic evening meetings and/or travel within and out of District boundaries to attend meetings. Incumbents may be required to work at a video display terminal for prolonged periods.