

PRINCIPAL FINANCIAL ANALYST

DEFINITION

Coordinates, plans, and analyzes financial matters related to cost proposals, budgets, expenditures, position control, income, student enrollment, attendance, and expenditure forecasting and related administration of the organization's fiscal responsibilities.

TYPICAL DUTIES

- Conducts studies in the areas of budget, accounting, fiscal management, and proposal preparation. Synthesizes fiscal information by analyzing budget requests, estimating budget requirements for the implementation and operation of special projects, analyzing costs, and recommending changes in methods and procedures to increase efficiency.
- Makes recommendations and presentations for budgeting and other administrative policies and procedures by analyzing current and proposed programs and practices.
- Acts as liaison between the District and community groups, educational agencies, and the public concerning District policies and fiscal procedures or the policies and procedures of public and private funding agencies relative to financing educational programs.
- Composes, edits, and otherwise directs the preparation of financial applications, statements, reports, bulletins, and procedures, or reviews financial reports prepared by others prior to forwarding to appropriate administrators.
- May investigate and develop requests for transfers among funds and accounts for additional and emergency appropriations.
- May analyze and make recommendations in regard to financial legislation, complex budgets, and fiscal controls and assist in drafting proposed legislation affecting the District financial status.
- May survey other school districts regarding matters related to school finance, such as comparative enrollment, income, and expenditures.
- May estimate District fiscal-year revenue derived from property valuations and tax overrides and calculate revenue control limits and property tax rates.
- May formulate and write standards and requirements for the annual guideline document, specifying input required for the preparation of the District budget.
- May represent the District in negotiations with federal and State agencies regarding proposals and administrative guidelines for specially funded projects.
- May perform general administrative duties in support of specific budget and financial responsibilities.
- May plan and conduct training programs on budgeting and fiscal management for area and school staffs.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Principal Financial Analyst serves as a specialist in financial matters and procedures related to proposal and budget preparation and modification, expenditure analysis, position control, and income forecasting for special or regular programs.

A Fiscal Services Manager supervises and participates in budget preparation and modification, expenditure analysis, and budget adjustment for schools, administrative regions, programs, or the District.

A Senior Financial Analyst serves as a staff assistant to an administrator by independently conducting complex studies and making recommendations related to grant proposals, budget preparation and modification, expenditure analysis, and position control.

SUPERVISION

General direction is received from an administrator of a major organizational unit. Supervision may be exercised over financial staff and clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Principles and procedures of governmental budgeting, particularly as related to a large school district
- Principles and practices of public administration, with emphasis on budget and fiscal affairs City, County, State and federal laws, and regulations and policies of the District as they affect financial activities
- Statistical methods and graphic presentation
- Use of computer information systems as they relate to budget and financial management
- Organization and functions of the District administration

Ability to:

- Communicate effectively orally and in writing
- Prepare clear concise reports
- Make effective oral presentations
- Plan work to meet deadlines
- Conduct and participate in meetings
- Supervise effectively
- Use applications such as Microsoft Word, Excel, Access, and PowerPoint

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university, preferably with a major in public or business administration, accounting, economics, or a related field. Experience in finance, budgeting, or a related field, beyond that required, may be substituted for up to two years of the required education on a year-for-year basis provided that the requirement of a high school diploma or equivalent is met.

Experience:

Five years of professional-level experience with analytical or managerial responsibilities in one or more of the following areas: revenues, expenditures, cash flow, investments, capital management, and financial forecasting.

Special:

A valid California Driver License.
Use of an automobile.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of the position at any time.

Revised
12-03-12
SJ