

ASSOCIATE FINANCIAL ANALYST

DEFINITION

Collects, compiles, and analyzes financial data to prepare and modify project budgets and proposals and to assure the maintenance of related records, controls, and fiscal and administrative procedures.

TYPICAL DUTIES

Performs a variety of analytical tasks related to financial or administrative activities involving some of the following functions:

- Reviews rules, policies, and procedures in order to recommend or establish and maintain financial controls
- Reviews budget adjustment requests and vouchers for completeness and accuracy, Board reports for budget changes, and joint ventures for accountability and control
- Analyzes overdrafts and surpluses applicable to specific programs and recommends adjustments to accounts
- Composes, edits, and reviews a variety of reports, including budget and financial status reports, procedure manuals, briefs of reports, articles, and regulations
- Compiles, calculates, and analyzes numerical data; obtains data from reports and records; and prepares tables, graphs, and narrative presentations
- Conducts studies and prepares reports regarding policies, procedures, support services, organization structure, and communications
- Contacts District personnel, representatives of other governmental jurisdictions, community groups, and others to obtain or impart information related to financial and administrative operations and to explain procedures and regulations
- Maintains or supervises the maintenance of files, records, logs, and schedules to control fiscal activity
- Assists in the installation of computer-based financial, budget, and administrative systems by supplying programming personnel with report formats and detailed specifications and by identifying discrepancies in printouts
- Codes simple computer programs or subroutines that do not require extensive design, testing, or systems considerations
- Utilizes or supervises the utilization of a computer to enter or extract budget, financial, or administrative data
- Makes oral presentations relative to assigned duties.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

An Associate Financial Analyst assists in the development of cost proposals and program budgets, counsels administrators on budget changes, and performs special financial and administrative tasks that are planned, outlined, and reviewed by a higher-level analyst or administrator who has expertise in financial management.

A Financial Analyst performs a variety of professional-level staff activities that are primarily oriented toward the analysis of financial data and budgets, the preparation of year-end fund availability reports, and long-range cash flow projections.

A Financial Aide receives training and performs well defined and less difficult duties directly related to more responsible tasks performed by higher-level employees in financial or accounting analysis classes. Progress to more difficult duties is expected as the employee gains in knowledge.

SUPERVISION

General supervision is received from a supervisory or administrative employee. Work direction may be exercised over clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Fundamentals of accounting theory, practices, and procedures; budgeting practices and procedures; and graphic presentations
- Sources of information regarding fiscal matters and accounting procedures
- Economic factors affecting public school finance
- Standard data processing concepts, applications, and capabilities

Ability to:

- Apply basic budgetary and accounting concepts and make valid analyses and comparisons
- Use critical judgment in the evaluation of data and the development of budget plans and recommendations
- Recognize discrepancies in numerical relationships
- Prepare and present clear and concise reports
- Analyze and apply rules, regulations, and laws
- Communicate effectively, both orally and in writing
- Work effectively with District employees

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university with a bachelor's degree, preferably with a major in accounting, public or business administration, 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 and completion of at least 12 semester units or equivalent in accounting, public or business administration, economics, or a related field.

Experience:

Six months as an Administrative Staff Aide, Financial Aide, Financial Manager, or one year of professional analytical, technical budget, or financial experience.

Special:

Some positions may require a valid California Driver License and the 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.

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