CLASS TITLE: FINANCIAL ANALYST II

BASIC FUNCTION:
Under direction, perform a variety of complex fiscal duties related to the gathering of local educational agency financial transactions; perform complex statistical analysis of financial data and design and prepare reports detailing analysis results. Review, monitor, consult and assist local educational agency staff with budget development, financial transactions, general ledger accounting functions, and state and federal guidance. Work closely with the SBAS Business System Support Team and the Technology Services department to ensure that computerized business systems are appropriately and efficiently utilized and are in compliance with generally accepted accounting standards.

REPRESENTATIVE DUTIES:
Perform a variety of complex fiscal duties related to the research, gathering, compiling, and analysis of local educational agency financial transactions; develop and utilize analytical tools and models for the analysis of data; design and prepare detailed records and reports on findings;

Participate in the fiscal component review and identification of school districts’ local control accountability plan expenditures within their adopted budgets;

Participate in monitoring school districts’ financial status as required by AB1200 legislation and intervene as needed; review districts' financial projections for accuracy and reasonableness; participate on AB1200 review teams, including county and regional review teams;

Perform independent projections of local educational agency budgets, ending balances, revenues, expenditures, cash flows; recognize and interpret financial, revenue and expenditure patterns;

Provide advisory services and technical expertise, information and assistance to local educational agencies regarding budgets, legislation and other related financial matters;

Identify potential issues and problems relating to the financial solvency of school districts;

Participate in the development of recommendations for preventing, intervening, and/or solving the identified issues and problems;

Assist with the development, testing and operation of new or existing computerized business systems; attend planning meetings as required;

Participate in system troubleshooting by providing a high level of accounting skills and knowledge to help identify and correct problems within the computerized business systems;

Assist the SBAS Business Systems Support Team and Technology Services staff in interpreting the California School Accounting Manual and Education Code;
Assist local educational agencies with their application of financial transactions in support of federal, state and California School Accounting Manual guidance;

Create a collaborative environment by providing technical leadership and analytical support to staff, local educational agency clients in the area of complex accounting transactions and financial management;

Maintain cooperative and collaborative working relationships with other departments, local educational agencies, and various state government entities; provide information and assistance to others as needed;

Maintain professional competencies in areas of responsibility; maintain contact with and participate in professional job-related organizations; serve as a liaison to professional groups;

Attend local, regional and state-level meetings and trainings on state budgets and their impact on local educational agencies, the local control accountability plan, school accounting, government reporting, and other related school business topics;

Provide written communications and oral presentations in the area of education finance, financial reporting, and the efficient and appropriate use of computerized business systems;

Attend meetings and provide informational workshops as appropriate;

Develop and implement new or revised procedures through a collaborative process to improve services;

Plan and organize tasks for maximum effectiveness and service; complete work to facilitate continuous workflow;

Supervise and assess the performance of assigned personnel;

May participate in the interview and new employee selection process; and

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

- Concepts and techniques related to research, gathering, compiling, and analysis of local educational agency financial and statistical transactions, and record keeping techniques;
- Concepts, applications and operations of modern business technology, integrated computerized business systems, financial spreadsheets, presentation software, word processing programs, and other related business and office software systems and equipment;
- Correct English usage, grammar, spelling, punctuation and vocabulary;
- Effective oral and written communication skills;
- California School Accounting Manual and applicable sections of the State Education Code and other laws, rules and regulations related to assigned activities; and
- Interpersonal skills using tact, patience and courtesy.

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ABILITY TO:
Perform a variety of complex fiscal duties related to the gathering of local educational agency financial transactions;
Perform complex statistical analysis of financial data and prepare detailed reports;
Participate in monitoring school districts’ financial status as required by AB1200 legislation;
Interpret and project revenue, expenditures, ending balances, and cash flows to determine if school districts face possible financial difficulties;
Identify potential issues and problems relating to the financial solvency of school districts and develop recommendations to solve the situation;
Plan, organize, and direct the activities of assigned personnel as requested;
Train and provide input into the evaluation of assigned personnel as requested;
Read, learn, interpret, apply and effectively explain government codes, rules, regulations, legal opinions, federal and state guidance, and financial data;
Work independently with little direction and confidentially with discretion;
Plan and organize work to meet schedules and timelines;
Analyze situations accurately and adopt an effective course of action;
Communicate effectively both orally and in writing;
Prepare and deliver oral presentations; and
Establish and maintain cooperative and effective working relationships with others.

EDUCATION AND EXPERIENCE:
Any combination equivalent to: a bachelor’s degree in business, public administration, accounting, finance or closely related field and two years of increasingly responsible related experience involving financial analysis with modern technology and integrated computerized business systems.

LICENSES AND OTHER REQUIREMENTS:
Valid California driver's license.

WORKING CONDITIONS:
ENVIRONMENT:
Office environment; and
Subject to driving to various sites to conduct work.

PHYSICAL ABILITIES:
Vision to drive and to observe, review and analyze financial reports and documents;
Hearing and speaking to effectively communicate and exchange information;
Sitting for extended periods of time;
Some climbing of small ladders;
Bending, kneeling and reaching to retrieve and file records;
Dexterity of hands and fingers to file and operate office technology and equipment; and
Lifting boxes weighing up to 30 pounds.

Should an applicant require reasonable accommodation, the Ventura County Office of Education will consider that upon request.