



West Valley - Mission

Community College District

CLASS SPECIFICATION

FINANCIAL ANALYST

Classified Position (Non-Exempt Status)

Classified Office, Technician & Business Services Salary Schedule – Range 73

DEFINITION

To perform professional work related to the development, analysis, and maintenance of community college district budgets; to prepare a variety of reports related to the budget process; and to provide district managers with professional expertise and assistance with the budget process.

DISTINGUISHING CHARACTERISTICS

This is the journey level in the single level Financial Analyst professional class. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit.

This class is distinguished from the Senior Financial Analyst in that the latter is responsible for overall budget development and administration, and for providing technical and functional oversight to professional and technical staff.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from an assigned supervisor; may receive technical and functional oversight from Senior Financial Analyst.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Analyze, develop, and administer budgets; track and analyze legislation impacting budget practices and procedures.

Prepare, analyze, and review budget and expense transfers.

Prepare periodic budget summaries, special reports, and technical documents as required.

Provide professional expertise to other district staff regarding budget preparation and processes.

Assist with administration of budget related processes and functions including audits, position control and grant reports.

Utilize specialized financial databases and/or software systems; coordinate with district information technology staff to test and modify systems as appropriate.

Build and maintain positive working relationships with co-workers, other district employees, and the public using principles of good customer service.

Foster an environment that embraces diversity, integrity, trust and respect.

Be an integral team player, which involves flexibility, cooperation and communication.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of accounting.

Methods and techniques of financial analysis and projection.

Automated financial systems.

Applicable federal, state and local laws, regulations, and reporting requirements affecting community college districts.

District organization, operations, policies and objectives.

Principles and practices of budget forecasting and analysis.

Pertinent district policies and regulations regarding budget practices.

Methods and practices of grant monitoring and applicable reporting requirements.

Ability to:

Design and analyze databases and spreadsheets for budget development and administration.

Provide information and assistance to district staff regarding budget development and administration.

Train and provide work direction to less experienced staff.

Plan, organize, and analyze assigned district and college level financial functions.

On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.

On a continuous basis sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Prepare, review, and reconcile a variety of financial statements, accounts, and reports.

Develop and maintain complex financial databases.

Assist in the development and maintenance of a community college budget system.

Use sound judgment in recognizing scope of authority.

Operate and use modern office equipment including computers and applicable software.

Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Utilize appropriate safety procedures and practices for assigned duties.

Communicate effectively orally and in writing.

Relate effectively with people of varied academic, cultural and socio-economic backgrounds using tact, diplomacy and courtesy.

Establish and maintain effective, cooperative, and collaborative working relationships with others.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible financial record keeping or budget tracking experience.

Education:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in finance, accounting, business administration, or a related field.

EEO Category: Professional Non-Faculty

Date Approved: July 1, 2017