Foothill-De Anza Community College District

District Financial Analyst

Department: Business Services
College: Central Services
Date: April 23, 2007

POSITION PURPOSE

Under the direction of the Director of Budget Operations, analyze, assist in developing and administering annual budgets for the District in accordance with sound fiscal management principles, established District policies and applicable state laws, codes and regulations; assist with implementation of District budget processes and provide technical expertise and direction to others regarding budget administration.

NATURE and SCOPE

The District Financial Analyst supervises no other personnel.

The position is responsible for assisting with District budget development and implementation processes.

KEY DUTIES and RESPONSIBILITIES

1. Be familiar with all aspects of budget development.
2. Know the models and formulas used in developing the District budget and work with other administrators and members of the District Budget Advisory Committee; make needed changes in those models.
3. Assist the Director of Budget Operations with budgeting process, variance analysis and financial modeling; analyze and summarize general ledger, human resources data and other financial and statistical data for management.
4. Research and analyze labor negotiation proposals; assist with costing proposals, analyzing feasibility, and impact on District funding.
5. Provide technical expertise and direction to budget and program managers, District and campus administrators regarding budget and accounting issues, financial reports, budget changes and transfers.
6. Take the lead responsibility in budget development and implementation processes in collaboration with key liaison and District administrators.
7. Participate in preparing financial and budget documents and reports including supporting agenda materials for presentation to the Board of Trustees.
8. Analyze new and proposed legislation, contract documents, state budget information and projections to determine current and potential impact on the District.
9. Prepare and process a variety of technical documents, claims for reimbursement, expense transfers and related materials.
10. Prepare periodic budget reports including narrative discussions of significant budget issues and analysis and interpretation of financial data.
11. Assist with the development and enhancement of information systems and procedures that facilitate budget development and administration processes; assist with the design and modification of spreadsheet and database reports and formats.

12. Access mainframe computer and import or transfer data as needed; confer with Information Systems personnel regarding special and ad hoc reports.

13. Review current status of assigned budgets, programs, and revenue and expenditure information to ensure continued financial viability and compliance with applicable statutes and regulations, including the approval and implementation of budget adjustments to restricted projects and the preparation and/or review of required reports to external agencies.

14. Participate in year–end fiscal closing activities.

15. Train and provide work direction to assigned personnel.

16. Perform related duties as assigned.

EMPLOYMENT STANDARDS

Knowledge of:

1. Generally accepted accounting principles applicable to community college district finance, including planning and analysis, forecasting, projection, budgeting, accounting, fiscal control and auditing.

2. Use of automated financial systems related to planning and analysis, forecasting, projection, budgeting, accounting, financial control and auditing functions, including equipment, applications, methods, procedures and practices.

3. Applicable district, county, state and federal laws, regulations and reporting requirements affecting community colleges, including provisions of the California Education Code, and the State Accounting Manual.

4. Modern office equipment, methods and procedures including use and application of mainframe and personal computers and associated software.

5. Principles and practices of training and work direction.

6. Interpersonal skills using tact, patience and courtesy.

7. Technical aspects of field of specialty.

Skills and Abilities:

1. Plan, organize and coordinate assigned District–level financial functions.

2. Design, analyze and use databases and spreadsheets for budget development and administration.

3. Prepare, interpret, review, reconcile, analyze, maintain and retain comprehensive financial statements, technical documents, records, accounts and reports.

4. Develop, coordinate, maintain and revise the budget system.

5. Provide budget development and administration expertise and direction to others.

6. Ability to communicate effectively, orally and in writing.
7. Use microcomputer and related software to prepare forecasting models and projections, maintain records and generate reports.

8. Analyze fiscal reports, spreadsheets, charts, graphs, tables and other materials and draw logical conclusions.

9. Develop and present recommendations and solutions to financial problems.

10. Prepare clear and concise reports.


12. Work independently with little or no direction.

13. Establish and maintain cooperative and effective working relationships with others.

14. Read, interpret, apply and explain rules, regulations, policies and procedures.

15. Train and provide work direction to others.

16. Meet schedules and timelines.

**EDUCATION AND EXPERIENCE:**

1. Any combination of education equivalent to a Bachelor's degree from an accredited college or university with major course work in accounting, finance, business administration, or a related field.

2. Three years of increasingly responsible budget and accounting experience, or equivalent transferable experience.

**WORKING CONDITIONS:**

**Environment:**

1. Typical office environment.

**Physical Abilities:**

1. Hearing and speaking to exchange information in person and on the telephone.

2. Dexterity of hands and fingers to operate a computer keyboard.

3. Seeing to read various materials.

4. Sitting for extended periods of time.

Date Approved: April 23, 2007
Range: P-11
EEO-Category: H-30