

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Staff Financial Analyst	REPORTS TO:	Chief Financial Officer
DEPARTMENT:	Finance	CLASSIFICATION:	Classified
FLSA:	Exempt	SALARY GRADE:	042 Confidential
ISSUED:	April 28, 2009		

BASIC FUNCTION:

Work directly with the Chief Financial Officer to perform high level and in-depth financial analysis; prepare standardized and specialized financial reports and analyses; assist with the development and implementation of systems and procedures.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)

E = Essential Functions

Assist the Chief Financial Officer in the overall function of the District's Financial Operations Division; accomplish special projects as assigned. **E**

Perform ad-hoc financial analysis as required; develop financial models, collect and evaluate data, make appropriate assumptions, analyze results and make recommendations. **E**

Assist in planning, organizing and implementing long and short-term programs and activities designed to develop programs and services. **E**

Provide technical expertise, information and assistance to the Chief Financial Officer regarding assigned functions; assist in the formulation and development of policies, procedures, and programs; advise the Chief Financial Officer of unusual trends or problems and recommend appropriate corrective action. **E**

Identify, research, and prepare evaluations on a variety of complex and diverse projects/problems (financial, operational, cost/benefit analyses and internal control). **E**

Participate in reviews of programs and systems development; perform feasibility studies and prepare project proposals; prepare specifications and develop timetables; develop and monitor system implementation plans. **E**

Prepare and maintain a variety of narrative and statistical reports, records, and files related to assigned functions. **E**

Communicate with other departments and organizations to coordinate activities and programs, resolve issues and conflicts and exchange information; develop policies and procedures to encourage effective and efficient management controls. **E**

Act as a project team leader and assign, review, and approve the results of assigned tasks completed by

others. **E**

Lead and direct the work of assigned staff. **E**

Perform related duties as assigned.

EDUCATION AND EXPERIENCE:

A combination of training, experience, and/or education equivalent to a bachelor's degree with a major in accounting, finance, business administration or a related field and seven years of progressively responsible, directly related experience with a strong analytic and reporting background and solid experience with analysis and modeling. A master's degree is highly desirable. Knowledge of PeopleSoft is desired.

LICENSES AND OTHER REQUIREMENTS:

None.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Microsoft Excel (macros, pivot tables, indexes, Solver) at expert level proficiency.

Complex financial models and analysis.

Operation of standard office equipment including computers and related software applications.

Reading and writing English communication skills.

ABILITY TO:

Provide leadership and direction in assigned functions.

Perform high level and in-depth financial analysis.

Develop complex spreadsheets and schedules at an expert level in Microsoft Excel.

Work independently with little direction in a team environment.

Analyze complex administrative functions and information requirements.

Demonstrate leadership skills while working with diverse groups of people.

Balance competing priorities and multi-task.

Maintain impartiality and objectivity.

Gain cooperation and consensus through discussion and persuasion.

Influence others to work toward common goals.

Operate standard office equipment including computers and related software applications.

Communicate effectively orally and in writing to individuals and large groups.

Establish and maintain effective working relationships with others.

Train and lead the work of assigned staff.

Represent the department while exercising diplomacy, tact, and judgment.

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

WORKING CONDITIONS:

ENVIRONMENT: Indoor, office setting.

PHYSICAL REQUIREMENTS:

Hearing and speaking to exchange information; seeing to perform assigned duties; sitting for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Job Code 6851

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