

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Lead Financial Planning and Development Analyst	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	Finance	CLASSIFICATION:	Classified
FLSA:	Non- Exempt	SALARY GRADE:	066 OTBS
ISSUED:	October 28, 2014		

BASIC FUNCTION:

Independently perform responsible budget and administrative studies and assist in the preparation of district budgets; coordinate assignments and projects within the assigned areas; lead the work of designated staff.

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

Lead, train, monitor, coordinate, and audit the work of designated staff; act as a project team leader and assign, review, and approve the results of assigned tasks completed by others. **E**

Lead the development, preparation and distribution of tentative and final budget allocations, monitoring budgets and expenditures to ensure compliance. **E**

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

Perform complex analytical and technical tasks involving the position control system for budget development and preparation of reports; assist in the implementation and maintenance of position control system, processes and protocols and monitor systems for validity and suggested improvements. **E**

Prepare complex fiscal, statistical, and government reports. **E**

Develop complex spreadsheets and schedules for district-wide use; create complex database queries. **E**

Provide technical expertise, information and assistance to all levels of district staff regarding assigned functions; assist in the formulation and development of policies, procedures, and programs; advise management staff of unusual trends or problems. **E**

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

Assist in planning, organizing and implementing long and short-term programs and activities designed to develop programs and services including review various budgets for completeness, accuracy, and compliance with laws and other regulations. **E**

Analyze budgets of division and departments and provide major assistance in developing and modifying program budgets; review and evaluate expenditures and analyze and project costs. **E**

Participate in reviews of programs and systems development; perform feasibility studies 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, contact carriers to resolve invoice discrepancies and exchange information. **E**

Complete special assignments. **E**

Perform related duties as assigned.

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE:

A combination of training, experience, and/or education equivalent to graduation from a recognized college or university with a major in accounting, finance, business administration, or other directly related field, and three years of recent, increasingly responsible budgetary or accounting and administrative analysis experience of acceptable level and quality. Master's degree is desirable. One year experience in the Planning and Development Analyst job class is desirable.

LICENSES AND OTHER REQUIREMENTS:

Possession of a valid California driver's license and availability of private transportation (mileage expense allowance provided).

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Advanced budgetary or accounting principles, systems, and procedures.
Technical aspects of budgetary or accounting analyses.
Microsoft Excel (macros, pivot tables, indexes, Solver) and database query 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:

Perform high level and in-depth financial analysis.
Organize and analyze budgetary or accounting procedures.
Prepare complex written and oral reports.
Develop complex spreadsheets and schedules at an expert level in Microsoft Excel; create database queries.
Work independently with little direction in a team environment.
Analyze complex administrative functions and information requirements.
Coordinate assignments and projects.
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 all levels of management and staff.
Plan and organize work to meet schedules and time lines.
Maintain records and prepare complex reports.
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 or standing 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.

Issued: 10/28/2014

Job Code 6852

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