

San Diego County Office of Education
Personnel Commission

FINANCIAL REPORTING ANALYST

<u>Definition:</u>	Under general supervision, assists school district staff, administrators and management with the preparation of financial and budgetary reports; creates detailed financial comparisons, reports and graphs as requested; assesses the microcomputer software and hardware needs of Business Advisory Services; performs installation and problem analysis of microcomputer applications; recommends and, after approval, implements application enhancements, improvements or changes as required.
<u>Typical Tasks:</u>	Assists school district administrators and management with preparation of financial and budgetary reports; creates detailed financial comparisons, reports and graphs as requested by consultants and user districts; researches, creates and maintains analytical financial reports; designs report formats; creates new analytical reports as requested by management and school districts; develops multi-year projection for school district budgets; researches and evaluates the utility of microcomputer software applications for financial and budgetary operations; modifies commercially-available software to enhance its utility in the preparation of financial and budgetary information; determines the configuration of existing or anticipated computer equipment and electronic databases during the planning, installation and maintenance of microcomputer applications; install microcomputer software applications; perform initial testing, data communications and problem correction analysis; assist in the preparation of hardware, software, or procedural documentation for Department personnel during application development and/or implementation; assist in training Department personnel in the use of microcomputer hardware and software; assists as liaison between microcomputer services, the State, districts and County Office staff; interacts with district personnel at all levels; performs related duties as assigned.
<u>Minimum Qualifications:</u>	Knowledge of: financial and budgetary principles and practices; forms design and analysis; system-level and commercial software applications; software and hardware product evaluation; requirements and procedures for determining the configuration of microcomputer equipment; microcomputer data communication concepts, capabilities and methods. Ability to: operate a microcomputer and related software including advanced spreadsheet and database applications; communicate effectively both orally and in writing; analyze and interpret financial and budgetary reports; manipulate numerical data in the production of reports; install microcomputer equipment, and system-level and commercially packaged software; analyze problems and implement solutions; work under demanding deadlines and manage multiple tasks; establish and maintain effective working relationships with all staff levels.
<u>Working Conditions and Physical Abilities:</u>	Office environment. Must be able to hear and speak to exchange information; see to perform assigned duties; possess dexterity of hands and fingers to operate computer and other office equipment; sit and/or stand for extended periods of time; kneel, bend at the waist, and reach overhead, above the shoulders horizontally, to retrieve and store files and supplies; and lift light objects.

(over)

Experience and Education:

A combination of education and experience which clearly demonstrates possession of the knowledge and abilities listed above. Typical qualifying experience would include: two years experience working with microcomputer applications for financial and budgetary operations performing comparable duties and responsibilities OR; completion of college-level coursework in accounting, business administration, finance or closely related field and, work experience in the business, financial, or budgetary operation of a major unit in a large organization. Applicants must have experience with advanced spreadsheet and database applications. Knowledge of school finance/accounting principles are highly desirable.

Established: 02/96

Revised: 07/03

Approved by the Personnel Commission: February 16, 1996