



JOB TITLE: FINANCIAL ANALYST

Classification: Confidential
Salary Range: 25

Retirement Type: PERS*
Board Approved: April 27, 2025

CONFIDENTIAL STATUS:

This is a confidential position as defined in Government Code, Section 3540.1. "Confidential employee" means any employee who, in the regular course of their duties, has access to, or possesses information relating to, their employer's employer-employee relations.

BASIC FUNCTION:

Under the general direction of an assigned administrator, the Financial Analyst performs work involving financial and budgetary analysis, year-end reporting, and long-range cash flow projections. This position conducts in-depth budgetary and financial reviews, monitors expenditures, and provides recommendations to enhance the District's financial operations and collective bargaining strategies. The position plays a vital role in financial planning, forecasting, budgeting, reporting, and supporting labor negotiations with the goal of long-term fiscal sustainability, cost-recovery strategies, and informed decision-making.

REPRESENTATIVE DUTIES:

Conducts complex budget and financial studies by collecting, compiling, analyzing, and interpreting financial data, including but not limited to data requests for funding formula calculations and bargaining purposes.

Prepares detailed financial reports with conclusions and forecasts based on research conducted (e.g., budget summaries, special reports, other financial documents.) Generates a variety of ad-hoc reports for collective bargaining purposes. Writes financial reports that contain descriptive, analytical, and evaluative content.

Provides professional expertise to District administrators in such areas as budgetary and financial management, economic analysis, and financial scenario models for collective bargaining.

Prepares presentations in written or oral format on budgetary and financial management matters for executive leaders, District administrators, committees, bargaining units, and other groups.

Reviews expenditure data and maintains records of revenue funds received. Analyzes and makes recommendations on budget requests. Prepares budget proposals that support District fiscal stability.

Surveys and investigates practices, procedures, and methods utilized in other private and public agencies in order to find solutions to District-identified problems in financial operations. Recommends improvements as needed.

Analyzes the possible effects of new and proposed laws, regulations, codes, and ordinances that may affect current budgetary and financial activities of the District. Makes recommendations to supervisor as appropriate.

Writes instructions, desk procedures, and manuals involving budgetary and financial management areas. Ensures all financial user guides are updated and kept current.

Provides technical assistance and training for District personnel on matters related to budgetary and financial management.

May serve as a lead and provide guidance and direction to other support staff.

Performs other related duties as assigned or requested.

JOB QUALIFICATIONS:

Education and Experience:

Bachelor's degree from an accredited college or university; and

Three (3) years of professional level, full-time, paid experience in a position handling accounting, finance, administrative analysis, auditing, or budgeting; and

Two (2) years of experience in financial analysis or budget analysis/development.

DESIRED QUALIFICATIONS:

Bachelor's degree with a major in accounting, finance, economics, business administration, or public administration.

OTHER QUALIFICATIONS:

Knowledge/Areas of Expertise:

Principles, practices, methods, and systems of budgetary and financial management.

Principles, practices, and theories of accounting.

Fiscal modules in large-scale Enterprise Resource Planning (ERP) platforms.

Research methods and techniques.

Methods of statistical analysis and presentation.

Current developments and trends in financial management.

Computer systems, software, and hardware used in financial and budgetary management.

Expertise in preparing clear and concise reports of budgetary, financial, and statistical data.

Expertise in planning and organizing work to meet deadlines.

Federal, state, local laws, ordinances, codes, and regulations affecting the financial management of the District.

Abilities/Skills:

Able to be sensitive to and understanding of the diverse academic, socioeconomic, cultural, and ethnic backgrounds of college students and of individuals with disabilities.

Able to fully utilize the capabilities and functions of office software applications and financial management tools (e.g., data management software, fiscal modules in large-scale ERP platforms, spreadsheets, presentation software, word processing programs) in completing assigned projects.

Ability to fully utilize the capabilities of specialized software programs in the production of management information and reports.

Ability to collect, analyze, interpret, and evaluate complex budgetary and financial management data, statistics, and trends and make recommendations.

Ability to interpret and apply laws, rules, regulations, and policies to financial and budgetary management practices.

Ability to establish effective interpersonal communications and secure the cooperation of administrators in the implementation of District procedures.

Ability to work effectively with District staff and representatives from bargaining units and other private and public agencies.

Ability to work independently on assigned projects.

Ability to learn specialized computer applications.

Ability to adapt to changing situations and work under pressure.

Skilled at presenting financial data in graphic, pictorial, tabular, written, and oral formats.

Skilled at the organization and management of records.

Skilled at preparing budget and financial plans to meet District objectives.

Skilled at devising practical solutions to complex problems.

Skilled at exercising creativity with sound, professional judgment.

Skilled at dealing with novel and difficult problems.

Skilled at training and providing technical assistance to others.

Skilled at presenting complex, technical information both orally and in writing.

Skilled at objectively evaluating worth methods and procedures.

Skilled at writing clear, comprehensive, and effective reports.

WORKING CONDITIONS:

Office environment.

Extensive computer work.

Dexterity of hands and fingers to operate a keyboard and mouse.

Sit for extended periods of time while using a computer.

Fluid information exchanges via phone, email, instant messaging, in-person, and videoconferencing.

May be exposed to confrontational situations when explaining or implementing District or departmental policies, procedures, or state/federal laws.

* Previous employment performed in a different public retirement system may allow eligibility to continue in the same retirement system.