



**Orange County Department of Education  
Human Resources Department  
Classified Management Class Specification**

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**Financial Analyst, Educational Services**

**Class Code: 1539**

**Work Days: 225**

**GENERAL PURPOSE**

Perform a variety of high level analytical, complex, and technical duties to assist the Educational Services Division in the effective management, implementation, and maintenance of budget and financial reporting; and provide support to higher level management staff.

**SUPERVISION RECEIVED AND EXERCISED**

1. Receives direction from higher level management staff.
2. Exercises direct supervision over technical and clerical staff.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

1. Recommend and assist in the implementation of goals, objectives, and strategic plan; establish schedules and methods for providing specialized services; implement policies and procedures.
  2. Assist Educational Services programs in maintaining an effective financial management process; discuss fiscal issues and recommend adjustments to management and program staff; and serve as a liaison between project accountants, managers, administrators, directors, local agencies, and the California Department of Education.
  3. Act as a resource to Educational Services administration and staff related to financial and budget guidelines, accounting procedures, program requirements, definitions, and financial applications and operations.
  4. Interpret, study, plan, research, and evaluate the projected budget and financial industry trends; develop and recommend effective and appropriate financial methods, techniques, and procedures for measuring and assessing budget and financial performance; and develop new capabilities for the improvement of processes and effectiveness in projecting revenue and expenditures.
  5. Analyze budget and financial reports obtained from grants with an emphasis on Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF); review, input, consolidate, balance, analyze, and monitor budget and financial data; audit, review, reconcile, and maintain records of accounting transactions, and monitor accounting reconciliations and procedures.
  6. Select, train, plan the work of, supervise, and evaluate staff; provide coaching to employees; collaborate on goal development; set clear expectations; provide constructive feedback; assist in improvement as needed; and check in regularly for understanding.
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7. Work with Educational Services programs to prepare preliminary, adopted, interim, and final budgets; develop budgets for individual programs; project income and expenditures; and review budgets with program administrators to ensure compatibility with goals and requirements.
  8. Analyze, examine, and assist in effective decision-making to ensure proper financial compliance associated with differentiated assistance goals and requirements; evaluate proposed budgets with comprehensive analysis of financial impact; use statistical information and spreadsheets; gather, examine, and analyze financial data; and prepare reports.
  9. Compile and prepare Educational Services standard and income contract reports; compare current and prior year financial data and analyze variances; evaluate projected revenue and expenditures; analyze and conduct research of financial and statistical data; recommend adjustments.
  10. Assist in the planning and implementation of financial reporting applications.
  11. Demonstrate attendance sufficient to complete the duties of the position as required.
  12. Perform related duties similar to the above in scope and function as required.

### **QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)**

#### **Knowledge of:**

1. Principles of effective supervision, leadership, training, coaching, and performance evaluation.
2. Principles and practices of accounting and budgeting.
3. Principles, methods, and practices of statistics and financial analysis.
4. Principles of advanced budget analysis and forecasting.
5. Federal, state, and local laws, codes, and regulations affecting assigned work areas.
6. Operation and application of automated systems relative to business and statistical use.
7. Business letter writing and basic report preparation.

#### **Ability and Skill to:**

1. Select, train, lead, coach, direct the work of, supervise, and evaluate technical and clerical employees; and effectively delegate authority and responsibility.
2. Compile, analyze, interpret, and report research findings.
3. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.
4. Effectively adapt and adjust program services to meet changing priorities and customer-specific needs.
5. Develop and present training materials.
6. Establish and maintain effective working relationships with various constituencies.
7. Understand, interpret, and explain laws, codes, contracts, regulations, policies, and procedures.
8. Prepare clear and concise correspondence, reports, and other written materials.
9. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.

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10. Communicate clearly and concisely, both orally and in writing, in English; and present information effectively in front of both large and small groups.

**Education, Training, and Experience:**

A typical way of obtaining the knowledge, skills, and abilities outlined above is a bachelor's degree in accounting, finance, business, public administration, or a related field and four (4) years of finance, budgeting, accounting, or related experience; or an equivalent combination of training and experience.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class.

**Physical Demands**

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification must be able to travel countywide to a variety of sites within a reasonable time frame, read written and electronic materials, and communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); perform deskwork for extended periods; and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces and move items weighing up to 25 pounds.

**Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

Employee typically works in an office environment that is moderately paced with moderate to high pressure.