

ASSISTANT FINANCIAL ANALYST
ASSISTANT FINANCIAL ANALYST (Confidential)

DEFINITION

Performs a variety of professional staff work of moderate complexity related to the analysis of financial and budgetary data and financial planning.

TYPICAL DUTIES

Performs a variety of professional administrative staff duties of moderate complexity related to the formulation, analysis, and execution of budget and financial management plans.
Conducts research investigations and studies of various financial activities in the District.
Fully utilizes the capabilities and functions of standard and specialized office software applications such as data management, spreadsheet, presentation, word processing, graphics, and communications in completing assigned projects.
Gathers, compiles, verifies, analyzes, and correlates financial data and prepares reports in graphic, pictorial, tabular, written, and oral form.
Writes instructions, procedures, and manuals involving budgetary and financial management areas.
Prepares reports, presentations, and correspondence containing descriptive, analytical, and evaluative content related to budgetary and financial management.
Confers with District and college staff regarding assigned projects on budgeting and financial planning and may make recommendations based on findings.
Assists in preparation of budget requests and budget proposals.
May oversee maintenance of business, financial, and budgeting records.
May make field surveys and investigations related to the financial operations of the District.
May expedite requests for the purchase, installation, or repair of equipment, tools or materials.
May provide work direction to clerical staff.
Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

An **Assistant Financial Analyst** performs professional level staff work of moderate complexity related to the analysis of financial and budgetary data and financial planning. The class of **Assistant Financial Analyst (Confidential)** is distinguished from the class of **Assistant Financial Analyst** because the employee, in the regular course of his or her duties, is required to have access to, or possess information relating to, the District's employer-employee relations.

DISTINGUISHING CHARACTERISTICS (Cont.)

A **Financial Analyst** performs a variety of complex professional-level staff work related to the analysis of financial and budgetary data, the preparation of year-end reports, and long-range cash flow projections.

A **Senior Financial Analyst** performs the more difficult and complex budgetary and financial studies and supervises a small staff engaged in the formulation, analysis, and execution of budget and financial management plans, and the development of budgetary policies, procedures and operations.

SUPERVISION

Immediate supervision is received from a classified administrator or supervisor. Functional supervision may be received from a Financial Analyst. Work direction may be provided to lower-level clerical staff.

CLASS QUALIFICATIONS

Knowledge of:

- Principles, practices, methods, and functions of budgetary and financial management
- Principles, practices and theories of accounting
- Research methods and techniques
- Methods of statistical analysis and presentation
- Basis methods and techniques of cost analysis
- Laws and rules concerning financial and budgetary management
- Techniques of data collection
- Capabilities of computer systems, software, and hardware used in financial and budgetary management
- Principles of recordkeeping

Ability to:

- Gather, compile, and analyze financial and statistical data
- Make accurate observations and obtain objective information
- Interpret and apply laws, rules, regulations, policies and procedures pertinent to financial and budgetary management
- Effectively utilize computer equipment, software, and management information systems in the performance of duties
- Make detailed and accurate calculations of financial data
- Apply statistical methods of analysis and prediction
- Prepare and present reports of financial and statistical data in tabular, written, graphic and oral form
- Make routine presentations in a group setting
- Plan and organize work to meet deadlines

Ability to: (Cont.)

Provide technical assistance to others

Work effectively and cooperatively with District staff and representatives of public and private agencies

Learn specialized computer applications

ENTRANCE QUALIFICATIONS

Education and Experience:

- A. Graduation from a recognized four-year college or university, preferably with a major in finance, accounting, economics, public administration, business administration, or a closely related field **AND** one year of full-time paid professional-level experience in finance, accounting, economics, public administration, business administration, economics, research, or a closely related field.

OR

- B. A master degree from a recognized college or university with a major in finance, accounting, economics, public administration, or a closely related field.

Special:

A valid Class "C" California driver's license.

Access to an automobile.