

## SENIOR FINANCIAL ANALYST

### DEFINITION

Performs complex budgetary and financial analysis, review of expenditures, and financial planning and makes recommendations regarding budget and financial operations of the District's activities; supervises a small staff of employees engaged in the formulation, analysis, and execution of budget and financial management plans and in the development of budgeting and financial policies, procedures, and operations.

### TYPICAL DUTIES

- Plans, assigns, and supervises the work of staff engaged in the analysis of budgetary and financial management plans.
- Directs the day-to-day operational activities including updating, adjusting, and maintaining the budget data base.
- Conducts the more difficult and technical budgetary and financial management analyses.
- Conducts studies related to program budgeting, management, finance and economic analysis.
- Develops income and revenue projections; analyzes legislation to determine financial impact on the District and prepares recommendations for proposed legislation and grant application.
- Develops procedures for preparing the annual budget and reviews and analyzes budget requests from organizational units for justification and validity of cost estimates based on historical and current year expenditures and income.
- Makes recommendations for budgeting and financial policies, procedures, and systems based on analysis of current and proposed programs and practices.
- Provides technical support and advice in the design, implementation, maintenance, evaluation, and revision of integrated financial, budget, accounting, and management information reporting systems.
- Analyzes economic conditions, financial markets and investment alternatives, recommends policy for the investment of reserve cash funds, and effects and monitors approved investment transactions and activities.
- Selects and trains assigned staff.
- Prepares complex reports containing descriptive, analytical, and evaluative content including the preparation of conclusions and forecasts based on data summaries and other findings.
- Consults with administrators and staff on matters related to financial and budget planning and analysis.
- Assists in planning and developing presentations and publication materials for the annual budget.
- Fully utilizes the capabilities of standard and specialized software programs in the production of management information and reports.
- Performs related duties as assigned.

### DISTINGUISHING CHARACTERISTICS

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 and financial policies, procedures and operations.

## 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.

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.

## SUPERVISION

General supervision is received from an academic or classified administrator. Immediate supervision is exercised over lower level analysts and clerical staff.

## CLASS QUALIFICATIONS

### Knowledge of:

- Principles, practices, methods, and systems of budgetary and financial management
- Principles, concepts, and theories of accounting
- Federal, state and local laws, ordinances, codes, regulations, policies and procedures affecting the financial management of the District
- Administrative organization of the Los Angeles Community College District
- Structure of the District's accounting and budget systems
- Current trends and developments in financial management
- Research, statistical, and forecasting methods used in financial management
- Capabilities of computer systems, software, and hardware used in financial and budgetary management
- Principles of supervision and training
- Organization and management of records

### Ability to:

- Develop, implement, and modify budget and financial plans to meet District objectives
- Compile, analyze, interpret, and evaluate complex financial and statistical data and trends, and make recommendations
- Prepare comprehensive and concise reports
- Analyze complex financial and budget data and interpret and apply pertinent laws, regulations, and principles

Ability to: (Cont.)

- Effectively utilize computer equipment, software, and management information systems in the performance of duties
- Express complex concepts effectively in oral and written presentations
- Deal with novel and difficult problems
- Exercise creativity and critical judgment
- Independently complete complex assignments
- Select, motivate, train, and supervise assigned staff
- Secure confidence, respect, and cooperation of individuals and organizations contacted in the course of work
- Learn specialized software applications

ENTRANCE QUALIFICATIONS

Education and Experience:

- A. Graduation from a recognized four-year college or university, preferably with a major in accounting, finance, economics, business administration or public administration **AND** four years of full-time paid professional level experience in an accounting, finance, administrative analysis, auditing, or budgeting position, including two years of experience in financial analysis or budget analysis and development. Supervisory experience is desirable.

**OR**

- B. A master degree from a recognized four-year college or university with a major in accounting, finance, economics, business administration or public administration **AND** two years of full-time paid professional level experience in financial analysis or budget analysis and development in an accounting, finance, administrative analysis, auditing, or budgeting position. Supervisory experience is desirable

Special:

- A valid Class "C" California driver's license.
- Access to an automobile.