

## **Business Analyst - Internal**

### **Purpose Statement**

The job of Business Analyst - Internal is done for the purpose/s of providing support to department activities with specific responsibility for the processing, recording, updating and reconciliation of financial information in compliance with established policies; identifying budget variances and recommending appropriate actions to comply with fiscal requirements and budget guidelines; and providing financial information as required by administrative and program personnel and/or regulatory agencies.

This job reports to Director, Internal Business Services

### **Essential Functions**

Acts as a liaison between school district and external vendors and agencies for the purpose of facilitating access to resources and maintaining positive working relationships.

Analyzes financial information and student data for the purpose of compiling statistical information, developing procedures, completing reports and conforming to established financial practices and regulatory requirements.

Calculates cost allocations and projections for a variety of apportionments, personnel, payroll etc. for the purpose of determining the financial resources and ensuring compliance with district and regulatory controls.

Compiles statistical and financial data for the purpose of developing budget recommendations; providing summaries; and/or ensuring compliance with established regulatory guidelines.

Develops special and regular financial reports and spreadsheets for the purpose of summarizing budget and financial data for management and school official use in their decision-making processes.

Maintains manual and electronic files, documents and records (e.g. account structure, current and historical budget data, financial records, etc.) for the purpose of providing up-to-date reference and audit trail.

Monitors account balances and related financial activity for the purpose of ensuring that allocations are accurate, related revenues are generated, expenses are within budget limits and/or fiscal practices are followed.

Oversees assigned programs (e.g. Medi-Cal, MAA, etc.) for the purpose of ensuring accuracy of data for decision making and/or complying with regulatory requirements.

Participates in unit meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.

Prepares a wide variety of written materials and electronic financial information for the purpose of documenting activities, providing reference, conveying information, and complying with established financial, legal and/or administrative requirements.

Recommends policies, procedures and/or actions on issues that relate to accounting functions for the purpose of providing direction and/or decision making.

Reconciles a wide variety of financial information for the purpose of updating and distributing information, authorizing for action and/or complying with established accounting practices.

Researches discrepancies of financial information and/or documentation (e.g. time sheets, grant funds, etc.) for the purpose of ensuring the accuracy and adhering to established procedures prior to processing.

Responds to inquiries of staff and administration regarding financial procedures for the purpose of providing information, direction and/or referral for addressing inquiry.

Reviews documents and data (e.g. purchase orders, accounts payable batches, payment requests, etc.) for the purpose of ensuring completeness and accuracy of purchasing process.

### **Other Functions**

Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, highly complex, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; performing standard bookkeeping; and preparing and maintaining accurate records.

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: accounting/bookkeeping principles; financial analyses and/or budget analyses; electronic spreadsheets and word processing; principles and objectives of budget preparation; and management evaluation and analysis.

ABILITY is required to schedule activities, meetings, and/or events; often gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to work with others in a variety of circumstances; work with data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job-related equipment. Problem solving is required to identify issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited to moderate. Specific ability based competencies required to satisfactorily perform the functions of the job include: establishing and maintaining effective working relationships; adapting to changing work priorities; communicating with diverse groups; meeting deadlines and schedules; setting priorities; working as part of a team; and working with detailed information/data.

#### **Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; monitoring budget expenditures. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

#### **Work Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 70% sitting, 15% walking, and 15% standing. This job is performed in a generally clean and healthy environment.

**Experience:** Job related experience with increasing levels of responsibility is desired.

**Education:** Community college and/or vocational school degree with study in job-related area.

**Equivalency:**

**Required Testing:**

**Certificates and Licenses**

**Continuing Educ. / Training:**

**Clearances**

Criminal Justice Fingerprint/Background Clearance  
Tuberculosis Clearance

**FLSA Status**  
Non Exempt

**Approval Date**  
2/14/2018

**Salary Grade**  
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