

ELK GROVE UNIFIED SCHOOL DISTRICT

CLASS TITLE: FINANCIAL DATA AND OPERATIONS ANALYST

BASIC FUNCTION:

Under the direction of the assigned supervisor, perform highly responsible and professional financial data analytical duties related to accounting and budget, personnel, position control, payroll and benefits; review, make recommendations and/or develop reporting options for the effective use of the District's financial and personnel systems; exercise independent judgment in general budget and authorized positions in accordance with established policies and procedures; serve as a technical expert and resource to users of the District's financial and personnel systems; may serve as a project leader providing training and support of various aspects of the District's financial and personnel systems; document and report a variety of technical and analytical data; prepare reports and calculations required by the Federal, State, and County agencies; prepare reports and calculations required by District administration and the Board of Education; ensure compliance with applicable laws, codes, rules and regulations.

DISTINGUISHING CHARACTERISTICS:

The Financial Data and Operations Analyst develops, implements and completes various reports and functions associated with data from the District's financial and personnel systems while working closely with management and staff. The Financial Data and Operations Analyst works independently under the direction of an assigned supervisor. The Financial Data and Operations Analyst serves as a liaison between Technology Services and District departments in relation to the financial and personnel systems of the District.

ESSENTIAL FUNCTIONS:

Conduct research, analyze and prepare data related to personnel, payroll, benefits, accounting and budget information.

Coordinate with appropriate staff in Finance, Human Resources, and Technology Services departments in matters pertaining to the District's financial and personnel systems.

Perform complex analytical and technical calculations involving program budget control and analysis, position control and analysis for Budget Development and the preparation of annual District budgets, reports, records and correspondence; perform special projects and research.

Ensure authorized positions are in the position control system, working closely with the Human Resources, Payroll and Benefits departments to certify accuracy of position control records.

Assist in the development and documentation of requirements for new systems or changes to existing systems; discuss user problems and test possible solutions.

Analyze user needs and system requirements of the District's financial and personnel systems.

Assist Technology Services with generating system and program design specifications for new systems and modifications to existing systems to meet District's financial and personnel needs.

Assist Technology Services with performing detailed program design to meet system design requirements and programming specifications.

Assist users in conducting tests of systems and programs assuring proper system function.

Communicate with users and support staff of the District financial and personnel systems.

Assist with generating and implementing plans for migration of legacy systems to new technology client server systems.

Conduct regular meetings with user departments to develop new system specifications, prototypes, and discuss user support issues.

Prepare complex reports, records and correspondence; prepare and provide monthly and periodic reports as required; perform special projects and research.

Attend a variety of meetings, workshops and conferences to maintain current knowledge of laws, codes, rules and regulations; provide resources for administrators and supervisors.

Operate a variety of office equipment including a computer and assigned software.

Assist with activities related to fiscal year transition, budget development, year-end closing and audits of the financial records of the district.

Analyze and review financial data; identify discrepancies of financial information.

Plan, organize and assist with implementation of long and short-term projects and activities related to finance, personnel, payroll and benefits.

Perform research, compile financial and statistical data, and participate in the preparation of a variety of financial and statistical reports related to assigned activities and required by the State, Federal agencies, administration and the Board of Education.

Provide technical expertise, information and assistance as requested regarding matters relating to financial data.

Maintain master files for District's Purchase Requisition routing system; work closely with Technology Services and Purchasing to troubleshoot issues and ensure system integrity.

Communicate with all levels of District personnel, outside organizations, auditors and other related positions to perform essential functions, resolve issues and conflicts and to exchange information.

Develop and present training materials to other district employees. Provide systems and process training as needed.

Perform related duties as assigned.

DEMONSTRATED KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Interpersonal skills using tact, patience and courtesy.
Capabilities, operation and utilization of computer systems and related equipment.
Systems and procedures analysis and development.
Methods and practices of accounting, budget, payroll, human resources, and financial reporting.
Position Control system and the fundamental principles of school personnel administration.
Bargaining unit contracts and Board policies.
General accounting principles and procedures.
California School Accounting Manual rules and procedures.
California school district budgeting.
District organization, operations, policies and objectives.
Financial and statistical record-keeping and report preparation techniques.
Oral and written communication skills.
Applicable laws, codes, regulations, policies and procedures.
Operation of computers and District software.
Modern office practices, procedures and equipment.
Mathematical computations.

ABILITY TO:

Plan, organize and assist in coordination of the collection and reporting of District financial data.
Analyze and report on financial and personnel data and work collaboratively with others to resolve issues.
Prepare financial reports required by the State, Federal agencies, administration, and the Board of Education.
Analyze financial data and prepare forecasts and recommendations.
Perform technical work involving program budget control and analysis.
Compile financial data and prepare related reports.
Meets schedules and timelines.
Interpret, apply and explain rules, regulations, policies and procedures.
Establish and maintain cooperative and effective working relationships with others.
Analyze situations accurately and adopt an effective course of action.
Work independently with little direction.
Plan and organize work.
Maintain files related to assigned activities.
Maintain consistent, punctual and regular attendance.
Operate a computer and assigned equipment.
Effectively communicate in order to exchange and understand information.
Read and analyze a variety of materials.

EDUCATION AND EXPERIENCE REQUIRED:

Any combination of training and experience equivalent to completion of an advanced degree in Business, Finance, Accounting or Business Administration and/or a minimum of five years of increasingly responsible experience in school district human resources, payroll and finance.

LICENSES AND OTHER REQUIREMENTS:

Valid California Class C driver's license.

Preferred knowledge of the District's financial and personnel systems.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment with frequent interruptions.

Driving a vehicle to conduct work.

Operate a computer and assigned office equipment.

BOARD APPROVED: July 22, 2025