

SALEM-KEIZER PUBLIC SCHOOLS JOB DESCRIPTION

4/20	BUDGET AND FINANCIAL OPERATIONS ANALYST	2.2.21
Effective Date	Job Title	Index

PURPOSE

Represents the District's interests by providing budget, financial and operational guidance of the bond program under the direction of the directors of budget and financial services and construction and maintenance services. Directly supports the chief operations officer in program management decision-making and leadership of the Community Bond Oversight Committee.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from an assigned supervisor. Tasks are performed using public sector budgeting, financial and operational practices including established policies or as prescribed rules and regulations. Work is reviewed periodically to assure compliance to standards and measured results.

ESSENTIAL FUNCTIONS OF THE JOB - May include, but are not limited to, the following:

Prepares formal budget documents, revenue and expenditure/cash flow projections, final reports, operational analysis and other specialized reports and analyses required for District leadership decision-making

Coordinates the most complex procurement activities including but not limited to the design and development of routine and non-routine solicitations for architectural, engineering, construction, program management and related services in support of the delivery of the bond program

Exercises broad discretionary decision-making authority related to ensuring operational procedures and key deliverables are accomplished on-time and within established budgets.

Acts as lead contract administrative support for all agreements, contracts and change orders; reconciles project/program budgets

Makes recommendations to the directors of budget/financial and construction/maintenance services and the chief operations officer to resolve scope, schedule and budget issues staying within overall program parameters.

Collaborates with Human Resources to monitor positions and finalize budgeted staffing

Works with District staff to prepare and formalize programmatic budgets and financial reports

Provides information and support to District staff to assist them in understanding financial/operational reports and data and fulfill program requirements.

Conducts routine analysis of the program cash flow analysis to inform investment decisions in compliance with federal, state and board requirements

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Serves as liaison between program management and District staff regarding program budgetary, financial and operational guidance

Monitors, identifies, and communicates over- expenditures to staff and problem-solves to bring expenditures back into acceptable levels

Develops and presents budget, financial and operational training as required

Develops programmatic cash flow, monthly financial statements and quarterly reports.

Prepares various financial/operational analyses as required by District senior management

Assists with writing budgetary/operational policies and internal controls related to the effective implementation of the bond program

Establishes and maintains collaborative working relationships with program staff

Maintains regular and consistent attendance and punctuality

Performs related duties consistent with job description and assignment

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of public-school district budgeting regulations, policies, and procedures including GAAP/GASB/FASB rules

Fund accounting and budgeting in education

Principles and practices of work organization, process design, and refinement

Trends, approaches and problem-solving techniques used in operations management and program/project delivery

Federal, state and local laws, processes and procedures governing public agency budgeting, construction, facilities and general obligation bonds

Laws governing public purchasing and contracting including public agency budgeting, contracts and bidding requirements

Techniques and principles of high-quality customer service

Oral and written communication techniques

Enterprise resource planning and accounting information systems

Application software to quantify and illustrate complex financial reports, comparisons, impacts, and/or projections

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Oregon local government budget law and the legislative budget process

Finance, accounting, budgeting, cost control and contracting/procurement procedures

Ability to:

Interpret financial data and prepare financial reports, statements and/or projections

Analyze budgetary expenditures for compliance with approved budget

Analyze situations accurately, evaluate alternative operational approaches and recommend effective courses of action

Organize resources to meet goals and deadline

Prepare, administer and monitor program/project budgets and anticipate future budgetary needs

Organize work effectively and to exercise independent judgment in making appropriate technical and procedural decisions regarding work methods and work products

Evaluate and establish work priorities with little or no supervision

Independently research, organize, and analyze technical information and prepare reports and recommendations as requested

Communicate clearly and concisely both orally and in writing

Establish and maintain effective work relationships

Maintain a flexible work schedule that may necessitate overtime during periods of high demand or special projects

Work with business ERP integrated financial system and related peripheral equipment and software including Advanced Excel and MS Word

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is appropriate. A representative way to obtain the required knowledge and abilities would be:

Experience:

Five or more years of progressively responsible governmental budgeting, construction, operational or management experience

Training:

Equivalent to a bachelor's degree in accounting, business administration or a related field.

Work Environment:

Climate controlled office settings and exposure to minimal noise intensity levels.

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High to moderate level of contact with program and district personnel. Lower level of contact with outside agencies/community.

Physical Requirements:

Frequent reaching, handling, fingering, talking and hearing. Mobility to work in a typical office setting and use standard office equipment, stamina to remain seated and maintain concentration for an extended period. Hearing and speech to communicate in person or over the telephone. Vision: Frequent near acuity; occasional far acuity. Vision to read printed materials, computer screens and/or other monitoring devices.

Strength: Sedentary/Light – Exert force to 15 pounds occasionally or a negligible amount of force frequently to lift, carry, push, pull or move objects.

Salem-Keizer School District is an equal opportunity employer.