



Cañada College ♦ College of San Mateo ♦ Skyline College

## GENERIC POSITION DESCRIPTION

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### FINANCIAL ANALYST

A Classified Professional Position  
Grade 195S – Salary Schedule 40

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#### ***A. Who We Are***

The San Mateo County Community College District is committed to achieving educational equity for all students. As outlined in the District’s Strategic Plan, “success, equity, and social justice for our students are longstanding goals.” The District’s [“Students First” Strategic Plan](#) is focused on “Student Success, Equity and Social Justice.” We provide students with a rich and dynamic learning experience that embraces differences — emphasizing collaboration and engaging students in and out of the classroom, encouraging them to realize their goals, and to become global citizens and socially responsible leaders. When you join our team at San Mateo County Community College District, you can expect to be part of an inclusive, innovative and equity-focused community that approaches higher education as a matter of social justice that requires broad collaboration among faculty, classified staff, administration, students and community partners.

#### ***B. The College and the District***

Skyline College is part of the San Mateo County Community College District and is designated as a Hispanic Serving Institution (HSI), enrolling approximately 16,000 students each academic year. Skyline College has a diverse student population that is a reflection of the communities that it serves. Detailed information about the student population, including data related to student success, can be found on [Skyline College’s Office of Planning, Research and Institutional Effectiveness \(PRIE\)](#) website.

#### ***C. Who We Want***

We value the ability to serve students from a broad range of cultural heritages, socioeconomic backgrounds, genders, abilities and orientations. Therefore, we prioritize applicants who demonstrate they understand the benefits diversity brings to a professional educational community. The successful candidate will be an equity-minded individual committed to collaborating with faculty, classified staff, administration, students and community partners who are also committed to closing equity gaps. The San Mateo County Community College District seeks employees who value mentorship and working in a collegial, collaborative environment, guided by a commitment to helping all students achieve their educational goals.

#### ***D. The Position***

The Financial Analyst performs professional work at the action level involved in the analysis, maintenance and auditing of college accounts and projects. The employee analyzes and prepares financial reports and records of revenues and expenditures; provides accounting advice to the College Business Officer (CBO) and senior account technicians and support staff; communicates results of financial analysis to CBO and management, makes recommendations for appropriate action and identifies problems and implements solutions. The Financial Analyst also provides professional accounting work at the action level involved in the analysis, tracking, maintenance and auditing of all funds, accounts and projects for the college.

Under supervision, the Financial Analyst position is responsible for administrative management and carrying out technical responsibilities involving a variety of business operations for the College with established standards and practices. This includes performing complex and detailed accounting work related to auditing, processing, and maintaining manual and online employee payroll and related employment records for classified hourly payroll; effecting, administering, coordinating, and tracking all types of transactions including but not limited to independent contracts, standard services agreements, purchase orders, procard transactions, journal entries, and reimbursements; in addition to supervising and ensuring the quality, compliance, and accuracy of such transactions, including appropriate insurance coverage among vendors and service providers, procard procedures and compliance, and travel and business reimbursement processing.

Public contact is extensive and involves faculty, staff at various levels within the organization, students, vendors, contractors, legal counsel, other educational institutions, governmental, funding and compliance agencies, and the general public, for the purpose of exchanging technical, policy and other information. A high degree of independent judgment and creativity are required to maintain, select and analyze financial data in order to make original recommendations and to resolve a variety of minor and potentially major problems that occur. Consequences of errors in judgment can be costly in employee time, public relations and/or institution funding; however, administrative controls limit the risk of serious consequences. A Financial Analyst can direct the work of accounting, paraprofessional, clerical and other staff as assigned.

### ***E. Duties & Responsibilities***

The duties below are representative of the duties of the classification and are not intended to cover all of the duties performed by the incumbent(s) of any particular position. The omission of specific statements of duties does not exclude them from the position if the scope of work is similar, related, or a logical assignment to this classification.

1. Exchanges technical information with College and District staff, legal counsel, other educational institutions regarding College and District budget and financial records, reports, audits, policies and procedural changes; drives a motor vehicle to off-site locations to attend meetings, workshops and other events to exchange current information
2. Prepares and examines budgets, expenditure reports, financial statements, budget variances and reports of historical trends for specially funded project directors, management, and Federal, State and local granting agencies
3. Plans, coordinates, implements and evaluates complex accounting projects for specially-funded programs and performs special analytical tasks as assigned by management; provides technical expertise, advice and direction to specially-funded accounting and support staff; serves as liaison and support to College business operations
4. Conceptualizes, researches, analyzes, compiles and communicates financial, contractual, statistical, and other data for the completion of special and regular reports, presentations, and other matters; assists project directors in researching, planning, writing, submitting, evaluating and managing applications for special funding; tracks and monitors funding requirements, agency reviews and timelines of various grant applications and other requested funding

5. Monitors purchase requisitions for compliance with regulations of the District and outside funding agencies; prepares and reviews budget transfers; prepares year-end accruals and serves as liaison to auditors to assure an accurate and successful annual audit; monitors and interprets Federal, State and local regulations and guideline and assures compliance with requirements; updates and revises procedures as necessary
6. Receives and reviews business contracts from College departments for compliance; ensures use of appropriate District contract form(s) to minimize exposure to risk and liability; facilitates execution of agreements and forwarding of executed agreements to proper parties through required approval process
7. Obtains and reviews external certificates of insurance and endorsements for all College events
8. Manages information exchanged among College staff and others regarding payroll matters, and regular employee payroll files, pay rate and work hour adjustments, over-payments and amounts due, salary calculations, and other related matters, as well as to provide and/or interpret operating policies and procedures
9. Reviews outcome of monthly and manual payroll processing, including information from College staff, collecting, auditing, and verifying accuracy of source documents related to employee files and compensation
10. Uses spreadsheets and a variety of other computer software to compose and prepare correspondence, memoranda, report narratives, research summaries, reports, recommendations, procedure manuals, surveys, and other materials
11. Sets up, maintains, and retrieves file data related to budget history, operational and fiscal trends, expenditure projections, audit recommendations, grants, and other information
12. Trains, supervises and evaluates the work of accounting and support staff; schedules, coordinates and monitors the work of other, outside staff on special projects as assigned.
13. Reviews, edits, and audits forms, applications, fiscal and other reports, evaluations, contracts, agreements, requests for services, and other materials for accuracy and timeliness
14. Performs other related duties as assigned

#### ***F. Requirements***

- Bachelor's degree in accounting, business administration, or a closely related field OR an equivalent combination of education and experience
- Successful work experience of increasing responsibility that has included financial analysis and reporting, project budgeting, planning, and design
- Skill in the use of spreadsheets, databases, presentation, and other software to compose and design reports
- Experience with training, directing, and coordinating the work of others
- Demonstrated cultural competence, sensitivity to and understanding of the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds of community college students, faculty, and staff
- Demonstrated skills in effective oral and written communication, including public speaking and persuasive communication
- Possession of a valid California Drivers' license (or the ability to obtain one) and have the ability to drive a motor vehicle.

#### ***G. Physical/Other Requirements***

This classification requires creativity, multi-level tasking, attention to detail and organization of financial data, listening, individual to large-group communication, persuasion, good memory, tact, patience, flexibility and the ability to drive a motor vehicle to off-site locations in order to perform the essential functions.

***H. Knowledge, Skills & Abilities***

1. Knowledge of generally accepted accounting and auditing principles, practices and procedures.
2. Knowledge of State Education Code, State Budget and Accounting policies and other applicable regulations.
3. Knowledge of grant and categorical funding resources available to institutions of higher education.
4. Knowledge of financial analysis and research procedures; skill in designing, developing, evaluating and monitoring financial systems.
5. Skill in the development and use of a variety of spreadsheet and other software instruments to conduct financial analysis and prepare reports.
6. Skill in planning, organizing, and coordinating the work of accounting and support staff, technical resources and other staff from various constituencies and levels within the organization.
7. Skill in training, directing and evaluating the work of others.
8. Skill in oral and written communication, including public and persuasive speaking.
9. Ability to communicate effectively with people of diverse cultures, language groups and abilities.
10. Ability to strategically-plan, organize, prioritize and implement multiple-tasked projects with similar timelines and anticipated outcomes

(9/2021)