

MONROE COUNTY SCHOOLS POSITION DESCRIPTION

Title: Financial Analyst

GENERAL DESCRIPTION

The position is responsible for developing, analyzing, and monitoring the budget of the school district. This role involves working closely with the finance team, school administrators, department heads, and other stakeholders to ensure that the district's financial resources are allocated efficiently and effectively to support educational goals.

Primary Duties:

This list represents the essential tasks performed by the position.

These essential job functions are not to be construed as a complete statement of all duties performed. Employees will be required to perform other duties as assigned.

Collaborate with the Finance Comptroller to prepare the annual budget.

Analyze historical financial data and forecast future budget needs.

Assists in preparing and/or reviews school-level, department and District budgets for completeness and accuracy, and adherence to policies, procedures and budget restrictions; prepares approved versions of budget and imports to web; prepares District budget books.

Develop budget models and scenarios to support strategic planning.

Monitor budget performance and identify variances between actual and budgeted figures.

Conduct financial analysis to support decision-making processes.

Ensure compliance with federal, state, and local financial regulations.

Prepare and submit required financial reports to government agencies.

Stay updated on changes in financial regulations affecting school district budgeting.

Work closely with school principals and department heads to understand their budget needs and constraints.

Provide training and support to school staff on budget management and financial procedures.

Serve as a point of contact for budget-related inquiries from internal and external stakeholders.

MONROE COUNTY SCHOOLS POSITION DESCRIPTION

Title: Financial Analyst

Assist in the development of long-term financial plans to support the district's strategic objectives.

Evaluate financial implications of proposed programs, policies, and initiatives.

Identify opportunities for cost savings and resource optimization.

Maintain accurate and up-to-date financial records and documentation.

Utilize financial software and systems for budgeting and reporting purposes.

Implement improvements to financial processes and systems to enhance efficiency.

Work closely with Human Resources to manage position control, ensuring that staffing levels align with budgetary constraints.

Assist in the analysis of staffing needs and the financial impact of staffing decisions.

Maintain a position control system that tracks the status and budget impact of all positions within the district.

Calculate lapsed salaries, ensuring that any savings from unified positions are accurately accounted for and reported.

Assist in the development and adjustment of salary schedules.

Provides professional accounting assistance and guidance to department and District staff as required.

Researches and recommends accounting controls and procedures and system improvements as appropriate.

Creates and maintains general ledger accounts.

Ensures proper reporting of financial information; reviews all financial documents for accuracy and proper classification.

Performs various accounting calculations and reports findings for report preparation and/or decision-making purposes and submits necessary information.

Prepares financial information/responses as needed for School Board meetings .

Prepares financial statements, various routine and special reports and related work papers for the Board, state Department of Education, external auditors, and for District use.

MONROE COUNTY SCHOOLS POSITION DESCRIPTION

Title: Financial Analyst

Coordinates with external auditors the completion of the annual certified audit and prepares the Comprehensive Annual Financial Report; performs internal audits, reviews and inventories to ensure financial compliance and control; ensures appropriate action in response to audit findings.

Assists in administering the use and maintenance of automated financial system software; troubleshoots problems and works with and contacts service provider.

Compiles financial data for and prepares routine and special reports, presentations, analyses and studies.

Receives and responds to inquiries, concerns and complaints in areas of responsibility and assists with special projects.

Attends training, seminars and conferences as required to maintain and enhance job knowledge and skills.

Performs general administrative/clerical duties as required, including entering and retrieving computer data, preparing reports and correspondence, copying and filing documents, sending and receiving faxes, answering e-mails.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice. Employees are expected to fulfill other duties as assigned.

GENERAL RESPONSIBILITIES AND REQUIREMENTS

Data Responsibility:

“Data Responsibility” refers to information, knowledge, and conceptions obtained by observation, investigation, interpretation, visualization, and mental creation. Data are intangible and include numbers, words, symbols, ideas, concepts, and oral verbalizations.

Synthesizes or integrates analysis of data or information to discover facts or develop knowledge or interpretations; modifies policies, procedures, or methodologies based on findings.

People Responsibility:

“People Responsibility” refers to individuals who have contact with or are influenced by the position.

Negotiates or exchanges ideas, information, and opinions with others to formulate policies and programs, or arrive jointly at decisions, conclusions, or solutions.

Assets Responsibility:

“Assets Responsibility” refers to the responsibility for achieving economies or preventing loss within the

MONROE COUNTY SCHOOLS POSITION DESCRIPTION

Title: Financial Analyst

organization.

Requires responsibility and opportunity for achieving widespread economies and/or preventing losses through the management of a department that has an organization-wide impact or significant impact on the general population.

Mathematical Requirement:

“Mathematics” deals with quantities, magnitudes, and forms and their relationships and attributes by the use of numbers and symbols.

Uses practical application of fractions, percentages, ratios and proportions, measurements, or logarithms; may use algebraic solutions of equations and equalities, deductive geometry, and/or descriptive statistics.

Communications Requirements:

“Communications” involves the ability to read, write, and speak.

Reads and interprets highly complex professional materials involving abstract theories and concepts; writes for professional publications; develops and presents papers at professional conferences.

Complexity of Work:

“Complexity of Work” addresses the analysis, initiative, ingenuity, creativity, and concentration required by the position and the presence of any unusual pressures.

Performs complex work involving the application of logical principles and thinking to solve practical problems within or applying to a unit or division of the organization; requires continuous, close attention to detail for accurate results; and involves frequent exposure to unusual pressure.

Impact of Decisions:

“Impact of Decisions” refers to consequences such as damage to property, loss of data or property, exposure of the organization to legal liability, or injury or death to individuals.

Makes decisions with extremely serious impact - affects entire organization and impacts other activities/organizations and the general public; where loss of life and/or damage is highly likely.

Equipment Usage:

“Equipment Usage” refers to inanimate objects such as substances, materials, machines, tools, equipment, work aids, or products. A thing is tangible and has shape, form, and other physical characteristics.

Establishes methods and procedures for acquiring and handling machines, tools, equipment, or work aids involving extensive latitude for judgment regarding attainment of standard or in selecting appropriate items.

Safety of Others:

MONROE COUNTY SCHOOLS POSITION DESCRIPTION

Title: Financial Analyst

“Safety of Others” refers to the responsibility for other people’s safety, either inherent in the job or to assure the safety of the general public.

Requires management level responsibility for application and interpretation of the policies regarding the provision of continuous enforcement of the laws and standards of public health and safety.

EDUCATION AND EXPERIENCE REQUIREMENTS

Education Requirements:

Requires a Bachelor’s degree or higher from an accredited college or university with concentration in finance, accounting, school administration, public or business administration.

Licenses Certifications Registrations Required:

“Licenses, Certifications, and Registrations” refers to professional, state, or federal licenses, certifications, or registrations required to enter the position.

Appropriate State of Florida professional certification as required and applicable.

Experience Requirements:

“Experience Requirements” refers to the amount of work experience that is required for entry into the position that would result in reasonable expectation that the person can perform the tasks required by the position.

A minimum of 3 years of progressively responsible work experience in finance and accounting involving schools, public agencies, or private businesses.

Demonstrated skill in oral and written communication.

Demonstrated ability to work with diverse groups of people.

Experience with industry-standard computer applications.

*A comparable amount of training, education or experience can be substituted for the minimum qualifications.

AMERICANS WITH DISABILITIES REQUIREMENTS

Physical Demands:

“Physical Demands” refers to the requirements for physical exertion and coordination of limb and body movement.

Requires sedentary work involving standing or walking for brief periods, exerting up to 10 pounds of force

**MONROE COUNTY SCHOOLS
POSITION DESCRIPTION**

Title: Financial Analyst

on a regular basis; and some dexterity in operating office equipment.

Unavoidable Hazards:

“Unavoidable Hazards” refers to unusual conditions in the work environment that may cause illness or injury.

The position is exposed to no unusual environmental hazards.

Sensory Requirements:

“Sensory Requirements” refers to hearing, sight, touch, taste, and smell necessary to perform the tasks required by the position efficiently.

The position requires normal visual acuity and field of vision, hearing and speaking abilities, color perception.

American With Disabilities Act Compliance:

ADA requires the District to provide adequate accommodations to qualified persons with disabilities. Prospective and current employees are encouraged to discuss ADA accommodations with management.

Term of Employment:

Annual Contract

Reports To:

Immediate Supervisor

Supervises:

N/A

PAY GRADE: From: DAB II To:

Exempt

Number of Months: 12 Number of Days: 254 Hours: 8

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____

Board Approved 7/30/2024