

**San Jose/Evergreen Community College District
Confidential Job Description**

Position: Lead Financial Analyst

Department: Fiscal Services

POSITION PURPOSE

Under general supervision, performs lead professional accounting and financial analysis duties consisting of gathering data and providing budgetary and financial analyses on matters associated with administrative decision making; supports executive management in financial analyses, modeling, and budget reconciliation, and assists with analyzing the impact of proposals used for contract negotiations, budget planning, resource allocation and other business needs; collaborates with the Information Technology Services and Solutions (ITSS) department on the use and enhancement of District financial systems; and performs related duties as assigned.

Incumbents assigned to the classification are exposed to sensitive collective bargaining information and materials during the negotiating process and are designated as a Confidential classification.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below exemplify the work of the classification and assigned duties may include work which is similar, related or a logical assignment to this class.

1. Performs complex accounting, financial, and statistical analyses, forecasting and reporting; prepares, reconciles, reviews and approves financial transactions and budget transfers in accounting systems; creates or reviews complex billing statements and invoices; monitors general, categorical and grant fund expenditures; ensures transactions comply with applicable state, federal, District and grant requirements.
2. Provides lead-level support to Budget Analysts and Administrators in the development, implementation and monitoring of budget processes; develops and implements budget calendars and formats related to budget preparation and maintenance; participates in identifying budgetary issues and concerns; recommends process improvements.
3. Prepares forecasting modeling in support of strategic decision making; gathers data and prepares revenue and expenditure forecasts for annual budgets and periodic budget status report briefings; develops and analyzes projections and variance reports; identifies cost-saving opportunities and ensures District financial integrity and stability.
4. Organizes and produces detailed financial reports, including quarterly, annual, and state-level documents; gathers, prepares, and submits a variety of periodic and ad hoc budget and financial reports and documents required by state and federal agencies and as requested by management; researches, gathers, and analyzes financial data and assists with preparing presentations for various audiences including shared governance committees and the Board of Trustees.
5. Prepares, reviews and analyzes a variety of grant compliance reports and expenditures; responds to requests for information and questions from funders; researches financial procedures and technical guidelines to resolve reporting and grant accounting issues, and recommends appropriate follow-up actions.
6. Prepares in-depth and thorough analyses of cost and feasibility of bargaining proposals and recommends alternative options for bargaining; provides real-time data during negotiation sessions to support District representatives in the negotiation process; conducts costing analysis necessary to protect the District's long-term solvency and to maintain financial stability; generates related reports and supporting documentation for the Board's consideration; supports other contract negotiation processes.

7. Partners with ITSS, Human Resources and Payroll to ensure compliance and to provide financial insights, plans and forecasts on financial impact of staffing and programmatic implementations; validates and projects the availability of funds for position control decision making; researches, analyzes and presents alternative solutions to various complex budgetary and accounting issues.
8. Provides technical guidance regarding accounting functions to various departments and fund administrators; provides technical expertise and resources to faculty, staff and administration on related budgetary matters; prepares, posts, reviews and reconciles journal entries.
9. Collaborates and participates in the improvements of financial system functionality and workflow to enhance the efficiency of budget and financial reporting systems and other software platforms; reconciles and assists with troubleshooting issues related to financial data integration, data integrity, accuracy and accessibility; assists in developing effective technology-driven internal control structures to ensure appropriate use of funds and compliance with pertinent statutes and regulations.
10. Leads, provides work guidance and participates in monitoring the work of lower-level professional and paraprofessional Fiscal Services staff; participates in scheduling, assigning and assessing the work of other employees for completeness, accuracy and conformance with District standards; provides information, instruction and training on work processes, proper uses of equipment and safe work practices; assists in ensuring a fair and open work environment in accordance with the District's commitment to equal employment opportunity.
11. Serves on committees and assists with District, local, regional, state and national conferences, meetings, workshops and training seminars as directed.
12. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

1. Generally accepted accounting and auditing principles, practices, and procedures.
2. Principles, practices and procedures of general and governmental accounting, including methods of financial accounting, control and reporting used in a community college environment.
3. Accounting and financial operations including the review, maintenance and adjustment of funds, accounts and budgets required for accurate financial and statistical records.
4. Generally Accepted Accounting Principles (GAAP), Governmental Accounting and Financial Reporting Standards (GASB Statements), and other standards and requirements applicable to community colleges.
5. California Community College Budget and Accounting Manual (BAM).
6. Grant funder and other funding sources practices, procedures, and requirements.
7. Financial analysis and research tools and procedures.
8. Principles and practices of public administration, including budgeting, purchasing and maintaining public records.
9. Provisions of collective bargaining agreements.
10. Pertinent federal, state and local laws, codes and regulations.
11. Integrated financial management systems.
12. Federal, state and other applicable laws and regulations and District policies and procedures governing Fiscal Services including applicable sections of California Education Code and Title 5.

13. Principles and practices used in the preparation of comprehensive, clear, and accurate financial reports and written materials.
14. Principles, practices, methods and techniques of program, administrative and organizational analysis and planning.
15. Practices and techniques of sound business communication; correct English usage, including spelling, grammar and punctuation.
16. Board Policies, Administrative Regulations, Accrediting Commission for Community & Junior Colleges Standards, Human Resources procedures and collective bargaining agreements.

Skills and Abilities to:

1. Analyze complex financial data and develop financial forecasts, plans, processes, reports, statements and recommendations, including those used in collective bargaining.
2. Prepare, consolidate and administer the District's operating and capital budgets.
3. Reconcile, balance and audit various records and accounts.
4. Interpret, apply and explain administrative and departmental rules, regulations, policies and procedures.
5. Analyze problems, identify alternative solutions, and implement recommendations in support of departmental goals and objectives.
6. Maintain confidential and administrative records and files.
7. Plan and organize work to meet schedules and time lines.
8. Provide accurate and timely reporting and accountability.
9. Prepare comprehensive and accurate reports and reviews.
10. Present solutions to management with confidence and effectiveness.
11. Determine work priorities and analyze situations using sound judgment in the application of policies, rules, regulations and standard operating procedures.
12. Contribute in building cohesive and effective work teams.
13. Establish and maintain cooperative and effective working relationships with others.
14. Operate a computer, assigned office equipment and standard business applications.

Education and Experience:

1. A bachelor's degree from an accredited institution in business administration, accounting, finance or a closely related field.
2. Three years of progressively responsible experience providing financial analysis or oversight of large, complex budgets.
3. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socioeconomic, gender identity, sexual orientation, cultural, disability, and ethnic backgrounds of the students we serve and sensitivity to and knowledge and understanding of groups historically underrepresented, and groups who may have experienced discrimination.

Desirable Qualifications:

1. Prior experience in professional accounting or finance services in higher education.
2. A professional certification or designation such as a Certified Public Accountant (CPA).

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employees work under typical office conditions, subject to frequent interruption and to intermittent exposure to individuals acting in a disagreeable fashion. The employee may be required to travel to locations other than the assigned work site, and occasional evenings, holiday and/or weekend work may be required.

Physical Demands:

While performing the duties of this class, employees are primarily in a stationary position and are required to move about the office to access office machinery, files, etc.; perform constant operation of a computer and other communication and office equipment; observe details at close range; and move or lift up to 10 pounds.

Mental Demands:

While performing the duties of this class, employees are regularly required to accurately communicate information and other ideas clearly and effectively using written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks; work with frequent interruptions; work independently and under intensive deadlines; and interact with District managers, staff, the public and others encountered in the course of work.

Board Approved: December 9, 2025
Salary Range: C-135
EEO Category: 2B2- Other Professionals