

OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Superintendent of Schools

January 25, 2012

Legislative File	
File ID Number:	12-0251
Introduction Date:	1/25/12
Enactment Number:	12-0207
Enactment Date:	1-25-12
By:	B

TO: Board of Education

FROM: Anthony Smith, Ph.D., Superintendent
Brigitte Marshall, Associate Superintendent, Human Resources Services and Support

SUBJECT: Reclassification of a Classified Management Position in the Financial Services Department

ACTION REQUESTED

Approval by the Board of Education of Resolution No. 1112-0145 – Reclassification of a Classified Management Position in the Financial Services Department.

DISCUSSION

A request was made of Human Resources to assess the Financial Service Associate I/II positions in Financial Services. Through that assessment it was determined the following position did not internally align with other existing District positions with similar skill sets and responsibilities. To support the operations of the department and address the responsibilities of the essential functions of this position and the department, the position of Financial Service Associate I/II is being recommended as a reclassification to Financial Analyst as follows:

Financial Services Department:

Reclassification

From:

Position Title/FTE

Financial Service Associate I/II

(I, 4.0 FTE) (II, 4.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL

I, Range 11: \$58,405 - \$74,540

II, Range 13: \$64,392 - \$82,172

12 months, 261 days, 7.5 hours

To:

Position Title/FTE

Financial Analyst (8.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL

Range 15: \$70,981 - \$90,601

12 months, 261 days, 7.5 hours

BUDGET IMPACT

Funding for positions is as follows: .80 FTE, General Purpose; .55 FTE, Special Education; .25 FTE, Title I; .40 FTE, Building Funds.

RECOMMENDATION

Approval by the Board of Education of Resolution No. 1112-0145 – Reclassification of a Classified Management Position in the Financial Services Department.

Legislative File	
File ID Number:	12-0251
Introduction Date:	1/25/12
Enactment Number:	12-6207
Enactment Date:	1-25-12
By:	B

**RESOLUTION
OF THE
BOARD OF EDUCATION
OF THE
OAKLAND UNIFIED SCHOOL DISTRICT
Resolution No. 1112-0145**

- Reclassification of a Position in the Ombudsman's Office -
Reclassification
- Financial Service Associate I/II - To
- Financial Analyst -

WHEREAS, it is the goal of the Oakland Unified School District to ensure organizational effectiveness, efficiency and accountability to further student achievement; and

WHEREAS, it is the intent of the District to develop a structure which focuses on providing high standards of service and increasing accountability across the system; and

WHEREAS, the District is committed to generate a productive highly trained staff able to work cooperatively and efficiently to provide quality customer service; and

NOW, THEREFORE, BE IT RESOLVED that the Board of Education hereby approves the Reclassification of the position of Financial Service Associate I/II in the Financial Services Department to Financial Analyst attached hereto and as listed below, and further approves and confirms said position's placement on the salary schedule listed below retro to be effective 12:01 a.m., July 1, 2011:

**Financial Services Department:
Reclassification**

From:

Position Title/FTE

Financial Service Associate I/II
(I, 4.0 FTE) (II, 4.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL

I, Range 11: \$58,405 - \$74,540

II, Range 13: \$64,392 - \$82,172

12 months, 261 days, 7.5 hours

To:

Position Title/FTE

Financial Analyst (8.0 FTE)

Salary Schedule/Range

Salary Schedule: ADCL

Range 15: \$70,981 - \$90,601

12 months, 261 days, 7.5 hours

and,

BE, IT FURTHER RESOLVED, that the Board authorizes 8.0 FTE for the position of Financial Analyst.

Passed by the following vote:

AYES: David Kakishiba, Noel Gallo, Christopher Dobbins, Vice President Jumoke Hinton Hodge,
President Jody London

NOES: None

ABSTAINED: None

ABSENT: Gary Yee, Alice Spearman

I hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District held January 25, 2012.



Edgar Rakestraw, Jr.
Secretary, Board of Education
Oakland Unified School District

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Enactment Number:	12-0267
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By:	B

Legislative File	
File ID Number:	12-0251
Introduction Date:	1/25/12
Enactment Number:	12-0207
Enactment Date:	1-25-12
By:	B



OAKLAND UNIFIED SCHOOL DISTRICT

Position Description

TITLE:	Financial Analyst	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	Financial Services	CLASSIFICATION:	Classified Management
FLSA:	Exempt	WORK YEAR/HOURS	261 days/7.5 hours
ISSUED:	Revised June 27, 2007 Revised: January 2012	SALARY GRADE:	ADCL 15

BASIC FUNCTION: Plan, organize, control and direct the needs of assigned Principals and Managers in budget development and training. Provide ongoing budget guidance, budgeting adjustments and additional monitoring and financial operations support. Implement and monitor processes to ensure site spending remains within approved levels.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements).

E = Essential Functions

Audit proposed budgets for accuracy and adherence to established guidelines and state and federal compliance guidelines. *E*

Assure that budgets do not exceed authorizations, nor underestimate requirements for staffing, supplies, etc. *E*

On an annual basis, assist in development and implementation of student-based budgeting formula and central office allocations for the Investment Framework. *E*

Analyze budgets of schools, divisions and departments and provide major assistance in developing program budgets, including making recommendations for budget modifications. *E*

In relation to assigned work, identify problems and troubleshoot the District's detailed budget preparation process, including data entry, matching to the budget development systems, Budget Development Tool (BDT) and IFAS, uploading and checking the overall and site-specific budgets after entry into IFAS. Ensure that budget allocations are properly reflected in SACS reports and Adopted Budget. *E*

In coordination with the Budget Director, develop and actively monitor the District's position control system to ensure that all District employees are in a valid, authorized position within the District's operating budget. *E*

Analyze highly complex problems with budgets and take immediate appropriate action to remedy issues, manage the development and dissemination of information to district personnel, including budget reports, income and expenditure projections, complex financial information for various funds, forecasts, future revenues and expenses; and prepare and maintain a variety of financial and statistical data. *E*

Work closely with HRSS and Payroll to identify and troubleshoot payroll problems related to position control (e.g., monitor and clean-up WAITAP status). *E*

Validate and upload detailed central office and school site budgets in accordance with the District's investment framework. *E*

Suggest appropriate sources of grant monies and monitor use. *E*

Monitor and guide to ensure budgeting adjustments are compatible with governmental guidelines. *E*

Monitor budget transfers and journal entries made by Principals, approve when necessary. *E*

Compile, organize and maintain current cost accounting and statistical data. *E*

Ensure that budgets are appropriately coded in accordance with the California School Accounting Manual (CSAM) following the guidelines stipulated in the Standardized Account Code Structure (SACS). *E*

Perform a monthly budget to actual analysis of revenues and expenses for assigned region or programs. *E*

Assist in the preparation and submission of the District's adopted and interim budget reports and related documentation to the County, State or other external agencies. Ensure that budgetary technical checks are cleared prior to submission. *E*

Regularly revise and update budgets based on year-end closing data, revised grant letters, and new funding. *E*

Monitor budgets on a regular basis to ensure that all funds and resources are balanced and that no fund, resource or account code group has a negative balance. *E*

Provide analytical support for District's Labor Relations department in all collective bargaining negotiations. Conduct a variety of analyses of historical spending patterns and future (projected) spending to be used in collective bargaining negotiations. *E*

Assist in completion of post-negotiations cost analysis (AB1200) for the Alameda County Office of Education, in order to demonstrate that OUSD is able to financially support agreed-upon collective bargaining arrangements. *E*

Participate in the evaluation of processes and the development of recommendations for procedural revisions and financial system improvements. *E*

Coordinate with accountants to ensure compliance with District, State and Federal policies, rules and regulations. *E*

Coordinate on a regular basis with accountants, payroll assistants, accounts payable clerks and human resources generalists to meet the needs of assigned sites. *E*

Stay apprised of all fiscal issues that arise at sites and within programs by proactively reaching out to aligned colleagues. *E*

Visit sites and departments to provide regular status reports and proactively address emerging issues. *E*

Provide training to site and program personnel. *E*

Participate in professional development on a regular basis. *E*

Perform related duties as assigned.

MINIMUM QUALIFICATIONS:

TRAINING, EDUCATION AND EXPERIENCE:

A Bachelor's Degree in Accounting, Finance, Business Administration and five years experience with public school district budget or fiscal control

Master's Degree preferred

Prior California public school district fiscal experience preferred

Customer service experience preferred

LICENSES AND OTHER REQUIREMENTS:

Demonstrated understanding of federal and state compliance policies

Demonstrated proficiency with computer-based quantitative and statistical tools

Valid California Drivers License

Employment eligibility that may include fingerprints, Tuberculosis and/or other employment clearance

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Public school finance

Budgetary and accounting principles, systems and procedures

Technical aspects of budgetary and accounting analyses

Customer services strategies and techniques

Federal and State compliance rules, regulations and policies

ABILITY TO:

Work with automated financial services systems.

Interpret appropriate funding agency guidelines, requirements and procedures

Identify and resolve budget problems

Interpret and reconcile data

Consistently meet and/or exceed client expectations.

Build high-functioning relationships with analysts both inside and outside of the financial services division

Establish and maintain effective working relationships with all levels of district staff and other agencies.

Use and leverage computer-based accounting applications

WORKING CONDITIONS:

ENVIRONMENT:

Indoor office setting; driving a vehicle to conduct work; fast-paced work, constant interruptions.

PHYSICAL DEMANDS:

Hearing and speaking to exchange information in person and on the telephone; seeing to read, prepare, and proofread documents, perform assigned duties; sitting or standing for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Non-Discrimination Policy:

The Oakland Unified School District does not discriminate in any program, activity, or in employment on the basis of age, creed, sex, race, ethnic background, marital or veteran status, national origin, disability, sexual orientation, or religion.