CLASS SPECIFICATION
SBDC Financial Analyst

FLSA Status: Exempt
EEOC Job Category: Officials and Administrators
Union Representation: Unrepresented

GENERAL PURPOSE
Under the direction of the Regional Director of the Small Business Development Center (SBDC) Lead Center, performs a full range of complex financial analysis and management of SBDC-Economic Resource Development (ERD) budgets, including development, implementation, review, management, analysis, and documentation of financial budgets and expenditures for the SBCD Network-Los Angeles, Ventura, Santa Barbara Lead Center activities; responsible financial management of SBDC Network, Lead Center, and ERD programs financial reporting compliance with circulars, federal, state and local government regulations, requirements, accreditation and audit standards; develops and delivers training as needed to ERD staff, Lead Center staff and SBDC Network; ensure quality control of Lead Center/Network and ERD financial reports and expenditures policies and requirements; interface with District Fiscal Operations staff; interface and direct SBDC Service Center staff as appropriate to achieve accurate invoicing for Lead Center objectives and program compliance.

ESSENTIAL DUTIES AND RESPONSIBILITIES
The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

QUALIFICATIONS

1. Plans, organizes, controls, manages and evaluates the work of assigned staff; with subordinate staff, participates in establishing operational plans and initiatives to meet department goals and objectives; implements department plans, work programs, processes, procedures and policies required to achieve overall department performance results; coordinates and integrates functions and responsibilities to achieve optimal efficiency and effectiveness; participates in developing and monitoring performance against the annual and program department budget.

2. Plans and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; monitors performance and provides coaching for performance improvement and development; provides or recommends compensation and other rewards to recognize performance; takes disciplinary action, up to and including termination, to address performance deficiencies, subject to management concurrence, in accordance with the District’s classified human resources policies and procedures and labor contract provisions.

3. Develops, implements, monitors, and maintains SBDC Network and ERD financial budgets, program income, and expenditures.

4. Develops and maintains SBDC Network and ERD financial management procedures, systems, and documentation; disseminates changes in SBDC invoicing policies and procedures to Lead...
Center, ERD, District Fiscal Operations staff, and SBDC Network personnel; provides training to SBDC Network and ERD staff as necessary.

5. Manages financial reporting timeline and activities; develops service centers invoice review processes and timelines to ensure compliance with District sub-recipient agreement terms, timely processing of invoices for payment, and good customer service to SBDC service centers.

6. Reviews and prepares quarterly SBDC service center budget updates or modifications for Regional Director’s approval.

7. Functions as liaison with SBDC and ERD Directors with regard to SBDC grant financial reporting procedures, requirements and compliance for program budgets, expenditures and supporting documentation.

8. Ensures SBDC Network compliance with applicable financial management policies and procedures (District, program, State, Federal), and program requirements per U.S. Small Business Administration (SBA), Chancellor’s Office of the California Community Colleges (COCCC), and other funding sources.

9. Leads, coordinates, and participates in financial reviews, internal financial audits; analyze and remedy audit findings; and quarterly review of SBDC Network service centers.

10. Develops, implements, and maintains systems to standardized network invoicing and documentation for audit purposes; evaluate and monitor accuracy of SBDC invoices submitted by SBDC network service centers and ERD programs; monitors and ensures integration of performance and budget; and reviews submission of supporting documentation for eligibility, and appropriateness.

11. Develops, analyzes, and prepares quarterly financial management reports, profit and loss analysis for revenue projects/programs, trend analysis reports and other financial reports for program management efficiency.

12. Prepares and reviews fiscal paperwork-budget and expenditure transfers, purchase requisitions, manage purchase orders, and other fiscal documents to meet District procedures and policies.

13. Responsible for overseeing, coordinating, and preparing annual district tentative, adopted Budgets development cycles and the Quarterly Budget Performance Reports; quarterly personnel salary distribution spreadsheet for accurate program expense distribution; reconciliation of program revenues and expenditures.

14. Researches purchase orders, payment status and other fiscal related items as requested.

15. Develops and prepares budgets for grant applications and program renewal.

16. Perform other duties as assigned related to financial management and analysis of program budgets.

Knowledge of:

1. Principles, practices and terminology of general and enterprise accounting.
2. Financial statement preparations and methods of financial control and reporting.
4. Cost and project accounting methods and procedures.
5. Auditing and internal control principles and practices.
6. General Accepted Accounting Practice.
7. Principles and practices of business financial data systems, ERP systems.
8. Public sector grant-funded program procedures, processes and requirements.
10. Oral and written communication skills, including correct English usage.
11. Data management concepts (data integrity, flow, set-up, customization, etc.).
12. Customer service concepts and applications.
13. Principles and practices of effective supervision.

**Ability to:**

1. Analyze business financial processes; organize workload and prioritize duties.
2. Analyze, evaluate and resolve problems independently.
3. Analyze data and prepare complex financial reports.
4. Maintain effective and cooperative working relationships with SBDC Directors in the Network, other SBDC and college personnel, external funding agencies, including the SBA, the COCCC, and private funders.
5. Maintain effective working relationships with clients, staff, and members of the general public from diverse socioeconomic backgrounds.
6. Operate personal computer with intermediate skills in Microsoft Word, business process mapping, and internet navigation.
7. Communicate effectively both orally and in writing.
8. Work independently and collaboratively.
10. Follow oral and written directions.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is bachelor’s degree from a four-year college or university with a major in accounting, finance, business administration or a closely related field and at least two years accounting or audit experience, preferably involving
grant accounting or audit in an academic setting, government agency; or an equivalent combination of training and experience. CPA or Audit Certificate is desirable.

**Licenses; Certificates; Special Requirements:**

A valid California driver's license and the ability to maintain insurability under the District’s vehicle insurance policy.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**

While performing the duties of this job, employees are regularly required to sit; talk or hear, in person or by telephone; use hands repetitively to finger, handle, feel or operate computers and other standard office equipment; and reach with hands and arms; Employees are frequently required to walk and stand; and lift up to 30 pounds. The employee must be able to perform travel throughout the Long Beach SBDC service area and travel to in-state and out-of-state events and conferences as required.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Mental Demands**

While performing the duties of this class, incumbents are regularly required to use written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions; and interact with District management, administrators, staff, vendors and others encountered in the course of work.

**WORK ENVIRONMENT**

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

Employees work under typical office conditions, and the noise level is usually quiet. The employee is occasionally required to attend evening meetings and travel. May be required to work evenings or weekends.