

## **BUDGET ANALYST**

### **DEFINITION:**

Under supervision of the Director of Fiscal Services, coordinates and performs complex analytical and technical work in the development, control and analysis of district budgets and the position control function of the financial system; monitors and maintains position control for all district authorized positions in accordance with established policies and procedures; reviews and analyzes financial and statistical data; prepares projections for revenue and expenditures; and performs related work as required.

### **QUALIFICATIONS:**

#### **Knowledge of:**

- Generally accepted accounting principles and procedures
- Principles, practices and terminology of budgeting, accounting, and financial recordkeeping as they apply to California school districts
- Principles and practices of position control management
- Budget preparation and administration
- Computer based software programs that support this level of work, including but not limited to, word processing, spreadsheets, presentation graphics, and data entry into custom databases
- Financial analysis, auditing, research, data collection, and preparation of reports and financial documentation
- California State Accounting Manual (CSAM) and Standardized Account Code Structure (SACS)
- Departmental operations, policies, goals, and objectives
- Modern office practices, procedures and equipment use

#### **Ability to:**

- Analyze and compile financial data and prepare related reports and forecasts
- Perform difficult accounting and budget work requiring the exercise of judgment in applying policies and regulations pertinent to the position
- Perform a variety of technical duties involving position control and related budget analyses
- Prepare and process financial, statistical and accounting reports, documents, records and materials
- Communicate both orally and in writing in a clear, concise manner
- Plan, prioritize, and organize work to meet schedules and timelines
- Work independently with minimum supervision
- Maintain accurate financial and statistical records and files
- Learn, interpret, apply and explain rules, regulations, laws, policies and procedures
- Make sound decisions necessary in the function of the position
- Establish and maintain cooperative and effective working relationships
- Work confidentially with discretion
- Learn and maintain proficiency on computers and related equipment and software
- Understand and carry out oral and written directions

#### **Experience and Education**

- Equivalent to completion of the twelfth grade
- Minimum of three years of progressively responsible business, accounting and/or human resources experience in a school district or government agency
- Advanced degree in Business, Finance, or Accounting, or a combination of education and experience, is preferred

**DISTINGUISHING CHARACTERISTICS:**

Incumbents of positions in this class work with independence and exercise sound judgment in applying policies and rules. This is a specialty classification performing technical and complex analytical tasks that support the maintenance of the district budget and position control system.

**ESSENTIAL FUNCTIONS:**

- Coordinates and performs complex and technical calculations related to district financial records and reports
- Reviews, projects, and adjusts revenues and expenditures based on program criteria
- Works closely and cooperatively with program managers, directors and administrators on budget issues
- Compiles data for financial and statistical reports, projections, and estimates
- Develops spreadsheets used for projections and analysis and in the preparation of various financial reports.
- Assists in forecasting revenue and expenditures, including cash flow forecasts
- Receives and reviews Personnel Action Forms for accuracy and appropriate approvals; establishes job codes as needed; creates and/or updates positions in financial system
- Ensures all authorized positions are reflected in the position control system in a timely fashion and changes made to positions are updated in the financial system; verifies adequate budget for positions; reconciles staffing allocations
- Performs complex analytical and technical tasks involved in the administration of the position control system for budget development and the preparation of the annual and interim District budgets; reconcile position control to payroll and budget
- Works closely with the Human Resources, Payroll and Benefits to ensure accuracy of position control records and facilitate communication among departments
- Participates in all aspects of the budget process, including budget development; analyzes future cost implications
- Generates reports to verify employees and positions are assigned to the appropriate school site or department
- Runs position control reports, salary/benefit projections, and scattergram reports as needed
- Performs annual and budget development position control rolls
- Prepares various reports as required by local, state and/or federal agencies; assures compliance with reporting requirements
- Provides technical assistance and training to ensure correct application of appropriate regulations, laws, and guidelines and appropriate use and understanding of district forms and reports
- Assists in annual year-end closing and audit
- Performs related duties as assigned

**PHYSICAL REQUIREMENTS:**

**Physical Abilities** include the usual and customary methods of performing the job's functions and require the following physical demands: occasional lifting, carrying, pushing and/or pulling; some climbing and balancing, some stooping, kneeling, crouching; reaching, handling, touching and/or feeling; manual dexterity to operate a telephone and enter data into a computer.

**Significant physical abilities** include ability to sit at a desk, conference table, or in meetings of various configurations for extended periods of time; see and read, with or without visual aids, laws and codes, rules, policies and other printed matter, computer screens and printouts; hear and understand speech at normal room levels and hear and understand speech on the telephone; speak in audible tones so that others may understand clearly in normal conversations.

**WORK ENVIRONMENT:**

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- The noise level in the work environment is usually moderate.
- Employees in this position will be required to work indoors in a standard office environment and come in direct contact with district staff and the public.