

BUDGET ANALYST

OVERALL JOB PURPOSE STATEMENT

The job of Budget Analyst is done for the purpose of performing difficult and very complex accounting and auditing duties in assisting the Controller in the preparation and maintenance of budgets, financial reports and accounting records.

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: Positions in the fiscal series ensure proper processing of accounting and budgeting data and provide necessary financial information to management. They provide for timely delivery of checks, payroll, billing invoices and other accounting-related records, reports and materials and provide audit trails and assist in resolving accounting-related issues and disputes. The Budget Analyst is an advanced-level technical and specialized classification that performs responsible and highly complex functions to assist the Controller in the establishment and maintenance of the District's financial systems including budget development and control for general and other funds. This position works with considerable independence and has overall responsibility for the soundness and reliability of the technical aspects of the budgeting and financial control systems and through presentation of training programs and oversight roles for ensuring adherence to District and other applicable financial standards as well as for relating the financial system to other key systems such as payroll and personnel. This class differs from the Accounting Technician which is an advanced-level class performing responsible and complex accounting functions requiring in-depth knowledge concerning technical application of accounting and accounting principles and are typically assigned complete responsibility for specific accounting functions of departments or special programs.

ESSENTIAL FUNCTIONS

- Assists the Controller and district managers with technical accounting issues for the purpose of preparing and analyzing information and data for developing the budget and implementing and controlling the annual budget and preparing periodic budget revisions.
- Attends in-services, classes, workshops, conferences (e.g. monthly, CASBO, etc.) for the purpose of providing the District with new policies and procedures.
- Audits various accounts, records and systems for the purpose of identifying discrepancies, resolving problems and issues and ensuring conformity to State and district accounting requirements (e.g. ASB accounts).
- Authorizes/assigns program budget numbers, object numbers, income numbers and balances for the purpose of maintaining chart of accounts and financial records and systems in compliance with district and county guidelines, policies and procedures.

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- Compiles/organizes data on special funds (e.g. capital facilities) for the purpose of monitoring and reporting fund activities, transactions and balances.
- Coordinates work among clerical staff of the finance office during vacations and absences for the purpose of ensuring continuous work flow and meeting deadlines by adjusting assignments and schedules as needed.
- Coordinates communication between the business office and various district departments and schools for the purpose of providing information related to financial accounting procedures, policies and requirements and for reconciling major databases and systems (e.g. personnel rosters and position control system).
- Develops/prepares special and regular reports for the purpose of extracting and summarizing budget and financial data from the financial systems for management and school board information needs and decision-making and for meeting state reporting requirements.
- Plans/prepares/conducts annual workshop for the purpose of training all school site and district office clerical staff on current and revised budget and accounting procedures.

OTHER FUNCTIONS

- Performs other related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE is required to perform basic math; read technical information; compose a variety of documents and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: concepts of grammar and punctuation; principles, practices and procedures of accounting including budget development, payroll, accounts payable and accounts receivable; applicable sections of State Education Codes and other federal, state, county and district laws, policies, rules and regulations.

SKILLS are required to perform multiple technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records; compile and analyze financial and statistical information and data.

ABILITY is required to schedule a number of activities; routinely gather, collate and/or classify data; and use basic, job-related equipment. Flexibility is required to work with others under a

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variety of circumstances; analyze data utilizing various processes some of which may be undefined; and operate equipment using defined methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job-related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is limited to moderate. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups; maintaining confidentiality; meeting deadlines and schedules; working as part of a team; and working with detailed information/data.

RESPONSIBILITY

Responsibilities include: working under limited supervision focusing primarily on results; leading, guiding and/or coordinating other persons; and monitoring the use of funds. Significant utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

WORKING ENVIRONMENT

The usual and customary methods of performing the job's functions requires the following physical demands: some lifting, carrying, pushing, and/or pulling; some climbing and balancing; some stooping, kneeling, crouching, and/or crawling; and significant reaching, handling, fingering and/or feeling. Generally, the job requires 75% sitting, 5% walking and 20% standing. The job is performed under minimal temperature variations, a generally hazard-free environment, and in a clean atmosphere.

EDUCATION

High School Diploma or equivalent supplemented by course work in accounting.

EXPERIENCE

Three years of accounting clerical experience in a school district environment.

REQUIRED TESTING

None Specified

CERTIFICATES AND LICENSES

None Specified

CONTINUING EDUCATION/TRAINING

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None Specified

CLEARANCES

Criminal Justice/Fingerprint Clearance; TB Clearance