

### Budget Analyst

#### **Purpose Statement**

The job of Budget Analyst is done for the purpose of providing independent, analytical, and technical budget analysis for a variety of District budget areas: Business, Educational Services, Maintenance/Operations, Transportation, Child Nutrition, Facilities and Special Programs support; providing direction for department activities with specific responsibility for assisting in the formulation, analysis and execution of the annual budget; identifying budget variances and recommending appropriate actions to comply with fiscal requirements and budget guidelines; analyzing budgetary components of programs and services; and providing analytical information as required by administrative and program personnel and/or regulatory agencies.

This job reports to Assigned Supervisor

#### **Essential Functions**

- Advises administrative staff, school officials, and Program Directors of funding alternatives/proposed program adjustments, and revenue options for the purpose of providing assistance to all levels of District management in budget preparation, resolution of budget variances and other financial issues.
- Analyzes financial information related to area of services assigned for the purpose of identifying budget variances, compiling data, identifying long-term budgetary goals, and/or conforming to established guidelines.
- Assists auditors and staff for the purpose of providing supporting documentation and/or information on internal processes that are required for audit, preparing the information and data required for developing budgets, controlling expenditures and/or preparing budget revisions.
- Calculates actual and projected allocations for a variety of departmental expenditures and assigned area processes for the purpose of determining level of sufficient financial services related to enrollment levels and District program components.
- Communicates with outside funding groups for the purpose of coordinating and maintaining District funding relationships.
- Compiles budget data from various sources for the purpose of providing budgetary information to District administration, developing accurate budget recommendations, providing summaries, and ensuring compliance with established regulatory guidelines.
- Conducts and participates in unit meetings, in-service training, workshops, etc. for the purpose of conveying and gathering information required to perform job functions.
- Coordinates with other budget analysts and District Administrators for the purpose of ensuring accuracy, implementation of budgetary changes, and historical documentation for audit.
- Initiates budget revisions for the purpose of implementing processes for transfers and discrepancy resolution while complying with established accounting practices.

- Maintains a variety of processes for the purpose of ensuring required staffing is available and summarizing budget and financial data for use in departmental decision-making processes.
- Oversees the preparation of budget transfers, amendments, position control, files, etc. for the purpose of ensuring accuracy of data for decision making and/or complying with regulatory requirements.
- Oversees financial transaction systems for the purpose of providing budgetary information to District administration, ensuring historical documentation, and providing implementation of District financial processes to provide accurate and timely budget preparation.
- Prepares income and expenditure estimates for the purpose of ensuring accurate allocations, reconciliation of revenues and expenses, and complying with Board Policy and Education Code.
- Prepares a wide variety of written materials and electronic financial and budget information for the purpose of documenting activities, providing reference, and conveying information, while complying with established administrative requirements.
- Responds to inquiries of staff and administration regarding financial procedures for the purpose of providing information, direction and/or referral for addressing inquiry.

### **Other Functions**

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, highly complex, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; performing standard bookkeeping; preparing and maintaining accurate records; analyzing budgets; analyzing data; applying assessment instruments; auditing financial reports; classifying data and/or information; and planning and managing projects.

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: California Education Code and District departmental procedures and practices; principles and procedures of public agency fiscal management and budget issues; accounting/bookkeeping principles; accounting, budgeting and fiscal management methods and terminology; financial analyses and/or budget analyses; electronic spreadsheets and word processing; principles and objectives of budget preparation; and management, evaluation, and analysis techniques.

ABILITY is required to schedule activities, meetings, and/or events; often gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to work with others in a wide variety of circumstances; work with data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals and/or groups; work with data of varied types and/or purposes; and utilize job-related equipment. Problem solving is required to analyze issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited to moderate. Specific ability based competencies required to satisfactorily perform the functions of the job include: planning, and organizing a variety of fiscal operations; analyzing, generating, evaluating and implementing financial procedures; preparing clear, concise and comprehensive reports and recommendations orally, and in writing; establishing and maintaining effective working relationships; adapting to changing work priorities; communicating with diverse groups; meeting deadlines and schedules; setting priorities; working as part of a team; and working with detailed information/data.

#### **Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; monitoring budget expenditures. 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.

**Work Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 90% sitting, 5% walking, and 5% standing. This job is performed in a generally clean and healthy environment.

**Experience:**

Six years experience in preparation or analysis of budgets, preferably for a California public school district.

**Education (Minimum):**

High school diploma or equivalent. Advanced training in finance and/or business administration required. B.S. in Accounting or related field is preferred.

**Required Testing**

Job-Related Skills Proficiency Test

**Certificates and Licenses**

None Required

**Continuing Educ. / Training**

Maintain Certifications and/or Licenses  
District Mandated Training

**Clearances**

Criminal Background Clearance  
Tuberculosis Clearance

**FLSA Status**

Non Exempt

**Approval Date**

December 14, 2021

**Salary Grade**

Range 28

**Revised Date**