

TRACY UNIFIED SCHOOL DISTRICT JOB DESCRIPTION

POSITION TITLE: Budget Analyst

DEPARTMENT: Financial Services

POSITION SUMMARY: Under the supervision of the Director of Financial Services, the Budget Analyst is responsible for budgeting, division planning and coordinating to ensure all original budget figures, budget adjustment and account balances are up to date and correct.

ESSENTIAL FUNCTIONS:

1. Prepares revenue projections; oversees all documentation pertaining to revenue.
2. Acts as liaison with consultants, auditors, staff, County Office of Education and State Department of Education.
3. Assists in analysis and evaluation of categorical funding.
4. Plans, evaluates, processes and manages all documentation pertaining to revenue and categorical funding.
5. Prepares resolutions, agenda items and documentation required for Board action.
6. Processes and completes all Federal, State, County, and locally required reports, continually monitoring the budget and process.
7. Sets up resources budgets within appropriate funds, verifies expenditures per approved budgets.
8. Maintains up to date financial statements, monitors cashflow, verifies income and expenditures.
9. Prepares schedules for all budgeting projects and continues to monitor and update schedules as changes occur.
10. Updates, maintains and distributes the District's Annual Budget.
11. Trains district staff in proper use of budgets and budget processes.
12. Selects, orients, supervises and evaluates subordinate personnel.
13. May train and delegate duties to lower-level department personnel.
14. Maintains regular and prompt attendance in the workplace.
15. Performs other related duties as required.

EDUCATION AND EXPERIENCE: Ability to provide and carry out oral and written directions in English, read and speak at a level sufficient to fulfill the duties described; ability to communicate in Spanish desirable. Graduation from a four-year college with a major in Accounting, Business or Public Administration, or a closely related field or equivalent experience in one or more of these areas; Certification in Public Accounting desired; minimum of two years of successful experience in educational finance or equivalent and supervision is desired. Possession of an appropriate California driver's license; insurable.

SKILLS AND QUALIFICATIONS:

1. Knowledge of school finance;
2. Knowledge of computerized records management systems and applications;
3. Knowledge of financial statement analysis and forecasting;
4. Ability to plan and carry out work programs with minimal supervision;

SKILLS AND QUALIFICATIONS: Continued

5. Ability to analyze problems, including the implementation of effective solutions;
6. Ability to write, speak, and work effectively with individuals and groups;
7. Ability to maintain cooperative working relationships with those contacted in the course of work (consultants and professional experts as well as all levels of district staff);
8. Ability to generate computer spreadsheets as a management tool.

PHYSICAL REQUIREMENTS:

Employees in this position must have the ability to:

1. Sit for extended periods of time.
2. Stand and/or walk on hard and/or uneven surfaces for extended periods of time.
3. Bend, squat, stoop and/or climb for extended periods of time.
4. Work on computers for extended periods of time.
5. Lift and carry up to 25 lbs. At shoulder height for short distances.

WORK ENVIRONMENT: Employees in this position will be required to work indoors in an office environment.

SALARY: Classified Management Range 35

DAYS OF SERVICE: 225 days

BOARD APPROVED: 12/12/00

Revised: 11.8.16 (range only)