

**San Diego County Office of Education
Personnel Commission**

CLASS TITLE: BUDGET SYSTEMS ANALYST

DEFINITION:

Under general supervision, plan, coordinate, and participate in training programs for SDCOE staff in areas related to internal business processing and systems applications; assist ITS staff in defining internal business systems requirements and developing utilization applications; assist SDCOE staff with internal business processing and systems applications; participate in budget monitoring and control activities for SDCOE programs and departments; assist in budget preparation and processing of budget adjustments; compile and prepare various financial reports.

REPRESENTATIVE DUTIES:

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

ESSENTIAL FUNCTIONS

Plan, coordinate, and participate in the administration of training programs for SDCOE staff in areas related to internal business processing and systems applications.

Implement and maintain systems, processes and procedures designed to improve the budgeting, financial and operational support of SDCOE programs and departments.
Assist ITS staff in defining internal business systems requirements.

Manipulate large amounts of data to compare and analyze changes.

Resolve questions for ITS staff related to internal business systems specifications.

Make final decision in implementing internal business system changes and develop test data and procedures to validate system output.

Define format and content of data input and management.
Research and identify internal business systems problems.

Assist ITS staff in establishing system controls to ensure completeness and accuracy of data and reports.

Provide solutions and recommendations regarding fiscal issues concerning General Fund and special fund budgets including budget control, position, control, and systems analysis.

Advise SDCOE employees on fiscal problems and explain applicable regulations and procedures.

Assure conformance with program guidelines; identify overdrafts, under-utilized funds, and encumbrances; determine account status and recommend adjustments to meet SDCOE needs.

Compute proposed budgeted salary expenditures.

Review proposed budgets from operating projects and programs for accuracy and completeness, making corrections as necessary.

Develop reallocations of budget amounts where appropriate.

Compile reports of various budget revenue and expense category accounts as requested.

Monitor, update, and maintain income and expenditures results to ensure appropriate action. Assist with budget development, adoption, increase, and adjustment processes.

Prepare, track and maintain summary budgets.

Prepare recapitulations of budgets by projects and programs.

Prepare reconciliation worksheets, budget reports, allocations by various measures and other statistical reports.

Input budget data and verify accuracy of account strings and account codes.

Prepare and maintain budget records.

Recommend adjustments in budgeted items based on expenditures and use patterns.

Assist with controlling budget amendment requests and ensuring processing.

Scrutinize fiscal operating reports, reconcile variances with budgets, and initiate revisions or adjustments where appropriate.

Conduct and participate in a variety of analytical studies related to fiscal matters; compile and analyze data and prepare reports.

Develop financial models for evaluation of financial alternatives.

Assist with compiling statistical data and making calculations.

Plan, develop, write, revise, and maintain program outlines, bulletins, memoranda, handbooks and manuals.

NON-ESSENTIAL FUNCTIONS:
Perform other duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF: financial accounting and budgetary principles and practices; large computerized accounting systems and applications; business practices and procedures; systems analysis and development; advanced excel formulas, computer hardware and software

product evaluation; requirements, restrictions and applications of database concepts; information systems management and implementation.

ABILITY TO: compile and interpret budget data; compare and analyze data changes; analyze user situational problems and recommend alternative solutions; identify and determine system and/or user problems; utilize available resources in problem-solving situations; accurately prepare detailed financial reports in a timely manner; write clear and concise instructions; communicate effectively, orally and in writing; establish and maintain effective and cooperative relationships with those contacted in the course of work; analyze training needs; develop and present effective presentations to individuals and small groups in training and development.

Meet continuous deadlines in a fast-paced environment

Exercise appropriate judgment in making decisions

Demonstrate attendance sufficient to complete the duties of the position as required

EDUCATION AND EXPERIENCE:

A combination of education, training and experience that clearly demonstrates possession of the knowledge, and abilities stated above. A typical qualifying background would include: two years experience involving large computerized accounting systems performing comparable duties and responsibilities -OR- Completion of college-level course work in accounting, business administration, finance or a closely related field and substantial experience involving familiarity with the business/financial/budgetary operation of a major unit in a large agency such as the Office of Education.

DISTINGUISHING CHARACTERISTICS:

A Budget Systems Analyst performs a variety of tasks related to the training of staff in internal business processes and systems applications, analysis of detailed financial data and detailed budgets using advanced Excel skills and formulas, the preparation of annual budget and year-end fund availability reports, and long-range cash flow projections. This classification is distinguished from classes in Integrated Technology Services in that specialized knowledge of computer programming is not required.

WORKING CONDITIONS & PHYSICAL ABILITIES:

Office setting.

Must be able to hear and speak to exchange information; see to perform assigned duties; sit and/or stand for extended periods of time; possess dexterity of hands and fingers to operate a computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lift light objects.

Established	Revised	Approved by Personnel Commission	FLSA Status	Job Code	Salary Range
02/2011	12/2013 11/2015	02/16/2011	Exempt		58
