

## **DINUBA UNIFIED SCHOOL DISTRICT**

### **CLASS TITLE: BUDGET ANALYST (CONFIDENTIAL)**

#### **BASIC FUNCTION:**

Under the direction of the Chief Business Official and assigned Administrator, train and monitor personnel in the use of assigned budgetary software programs; assist with the coordination and implementation of assigned budgetary software; assist in the development, control and monitoring of designated District budgets; prepare, maintain and assure accuracy of related budgetary and financial records and reports.

#### **REPRESENTATIVE DUTIES:**

##### **ESSENTIAL DUTIES:**

Train and monitor personnel in the use of assigned budgetary software programs; oversee data entry and provide training related to assigned budget procedures and data entry; assist with the implementation of cross-training among various departments; provide individual training and ongoing training for assigned software as needed.

Assist with the coordination and implementation of assigned budgetary software which includes position control, absence/leave tracking, budget and health/welfare components; collaborate with various departments to assure budget-related tasks are completed in an efficient and prompt manner.

Perform a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets; assure compliance with established budgetary guidelines, rules, regulations, policies and procedures; process balance transfers according to established procedures; monitor revenue receipts and maintain expenditure control; assist administrators and other personnel in maintaining and maximizing budgets.

Research, compile, prepare and revise financial data related to assigned budgets, accounts and activities; prepare and maintain a variety of auditable financial records, reports and files related to budgets, accounts, income, expenditures and assigned activities; provide regular reports pertaining to site expenditures, leave accounts, position control and other items as assigned.

Input a variety of budgetary and other financial data into an assigned computer system; maintain various automated records and files; initiate queries, manipulate data, develop spreadsheets and generate a variety of computerized reports and statements; assure accuracy of input and output data; generate and maintain shared files for contracts, payroll reports, business services cross training, human resources cross training and other files as assigned.

Prepare items for Board approval; prepare assigned budget reports for sites and for budget meetings; prepare assigned software and system updates as needed and create reminders for meetings as assigned; process purchase order requisitions for board approved contracts as assigned.

Review board meeting agenda to identify what contracts are being considered for approval and

assure purchase orders have been properly generated by corresponding sites; assure necessary signatures have been obtained for purchase orders; prepare budget reports for Board meetings as needed.

Communicate with personnel and outside agencies to exchange information and resolve issues or concerns; prepare presentations for personnel and community as assigned.

Operate a variety of office equipment including a calculator, copier, fax machine, folding machine, postage meter, shredder, computer and assigned software.

**OTHER DUTIES:**

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

General accounting, budget and business functions of an educational organization.

Theory, principles and practices of accounting and financial record keeping.

Database systems and accounting applications.

Preparation, review and control of assigned budgets and accounts.

Preparation of financial statements and comprehensive budget reports.

Financial and statistical record-keeping techniques.

Methods, procedures and terminology used in technical accounting work.

Applicable laws, codes, regulations, policies and procedures.

Financial analysis and projection techniques.

Data control procedures and data entry operations.

Oral and written communication skills.

Interpersonal skills using tact, patience and courtesy.

Modern office practices, procedures and equipment.

Operation of a computer and assigned software.

Mathematic computations.

**ABILITY TO:**

Implement training programs related to software systems.

Develop training materials and train personnel individually or in groups.

Perform a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets.

Evaluate and project annual income and expenditures to determine budget requirements.

Maintain accurate financial and statistical records.

Analyze financial data and prepare reports, forecasts and recommendations.

Verify, balance and adjust budgets and accounts.

Review, process, evaluate and verify a variety of budgetary and financial information.

Identify, investigate and resolve financial errors and discrepancies.

Assemble, organize and prepare data for records and reports.

Reconcile, balance and audit assigned budgets and accounts.

Interpret, apply and explain rules, regulations, policies and procedures.

Compare numbers and detect errors efficiently.

Communicate effectively both orally and in writing.

Establish and maintain cooperative and effective working relationships with others.  
Work independently with little direction.  
Meet schedules and time lines.  
Perform mathematic computations.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: bachelor's degree in accounting, finance or a related field preferred and two years of accounting or auditing experience.

**WORKING CONDITIONS:**

**ENVIRONMENT:**  
Office environment.

**PHYSICAL DEMANDS:**  
Dexterity of hands and fingers to operate a computer keyboard.  
Hearing and speaking to exchange information in person or on the telephone.  
Seeing to read a variety of materials.  
Sitting for extended periods of time.  
Bending at the waist, kneeling or crouching.  
Reaching overhead and above shoulders to retrieve files.  
Lifting, carrying, pushing and pulling light objects.

Employee \_\_\_\_\_ Date \_\_\_\_\_

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

