



JOB DESCRIPTION

Position Code: 701
Classified Group: CSEA
Salary Range: 31
Work Days: 260
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POSITION TITLE: Budget Technician

DEFINITION: Under general direction, responsible for performing technical accounting and budgetary duties of assigned district budgets and/or programs; prepares projections and estimates and monitors account activity to identify and resolve discrepancies; provides oversight and technical guidance to district staff to ensure income/expenditures are accurately reported to fiscal services.

DIRECTLY RESPONSIBLE TO: Manager, Fiscal Services

SUPERVISION OVER: N/A

DUTIES AND RESPONSIBILITIES: (Any one position may not include all of the duties listed; the listed examples do not include all duties and responsibilities that may be found in positions within this classification.):

1. Performs technical calculations and analyses to prepare income/expenditure estimates and budget projections for assigned budgets and/or programs.
2. Prepares and verifies financial reports for district staff, Board of Education, state, federal and other outside agencies.
3. Monitors assigned budgets and/or programs transactions to ensure revenues and expenditures are processed accurately in the general ledger and resolves discrepancies.
4. Reconciles revenues and expenditures and analyzes data to determine the source of the error(s) to identify and resolve discrepancies.
5. Receives, reviews, and processes budget documents such as budget revisions, expenditure transfers, journal entries, and cash transfers.
6. Collaborates with other district departments to reconcile position control and ensure all district authorized positions are accurately reflected within district budgets and the position control system.
7. Assists with preparing annual and interim budgets, year-end closing process, and independent audits.
8. Provides technical guidance and oversight for assigned areas of responsibility to assist district staff at the site/program/department level.
9. Collaborates and confers with district managers and staff to assist with preparing, revising and clarifying budgets and resolving related issues.
10. Escalates higher-level technical questions and issues to appropriate fiscal services personnel for resolution as needed.
11. Assists with the development of department-related training materials, procedure manuals and handbooks and may assist with in-service trainings.
12. Performs related work as required.

QUALIFICATIONS:

Education and Experience:

Any combination of training, education, and/or experience equivalent to graduating with a two-year degree from an accredited college or university with major course work in accounting and

finance or a related field. Accounting and budget experience in a school district or government agency is desired.

Knowledge, Skills, and Abilities:

- Knowledge of generally accepted accounting principles, including California school district budgeting and accounting
- Knowledge of district objectives, operations and polices applicable to the fiscal services department
- Knowledge of interpersonal skills using tact, patience and courtesy
- Knowledge and skill in use of computers and assorted software programs
- Knowledge of modern office practices and procedures, including filing systems
- Knowledge of procedures and practices required in research, data collection, statistical computation and reports
- Knowledge of preparation of reports and financial documentation
- Ability to understand and follow verbal and written instruction
- Ability to learn, interpret, explain and apply applicable federal, state, and local laws, regulations, rules, codes, policies and procedures
- Ability to analyze and interpret fiscal data, draw logical conclusions and prepare clear and concise reports
- Ability to work independently, with minimum direction and make decisions within the framework of established guidelines
- Ability to establish and maintain records, and maintain a confidentiality of privileged information obtained in the course of work
- Ability to establish priorities and meet deadlines
- Ability to perform research, compiling information from a variety of sources
- Ability to make mathematic computations quickly and accurately
- Ability to communicate effectively both verbally and in writing with all levels of district staff and the community
- Ability to explain procedures clearly and accurately to district personnel
- Ability to perform clerical tasks with maximum efficiency and accuracy
- Ability to remain calm in stressful situations
- Ability to work effectively with all levels of district staff and the community
- Ability to maintain consistent, punctual and regular attendance

WORKING CONDITIONS:

Work Environment:

- Indoor office environment
- Moderate noise
- Continuous contact with staff

Typical Physical Characteristics: (with or without use of aids; consideration will be given to reasonable accommodation).

- Communicate to exchange information both in person, in small groups, and/or on the telephone
- Inspect documents and other written materials with fine print

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- Move about facilities to conduct work, including walking, sitting, or remaining in a stationary position for extended periods of time
- Operate office equipment requiring repetitive hand movement and fine coordination

Other Characteristics:

- Ability to work additional hours and weekends on occasion

This job description is not a complete statement of essential functions and responsibilities. The district retains the discretion to add or change typical duties of a position at any time.

Board Approved: 5/11/2010
Revised: 2/13/2019