

**27J SCHOOLS
EXEMPT JOB DESCRIPTION**

Job Title: Budget Analyst
**Date Prepared or
Last Modified:** November 6, 2017, Reviewed December 2020
Work Year: 260 Paid Days
Department: Finance
Reports To: Budget Director

SUMMARY: Assists in the preparation of the annual adopted/amended budget. Provides analysis for all aspects of the budget process, including budgetary oversight of departments and schools. The role works directly with department and school leaders by assisting in a variety of areas including monthly budget status reports, strategic analysis, research, and year-end budget and expenditure projections.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- D 40% Coordinates, prepares and monitors the district’s annual financial plan and budget. Advises departments and schools on budget processes and requirements. Analyzes reports and meets with department and school personnel to discuss concerns and/or answer questions. Advises district stakeholders about budget-related training, general information, financial presentations and other budgetary matters.

- M 20% Monitors and maintains budget activities throughout the year providing technical and analytical support district wide. Develops variance analysis of budgeted versus actual expenditures and promotes the alignment of budget to actual activities. Prepares financial information for analysis and comparison including trends and multi-year projections.

- W 15% Provides financial analysis for district decision makers. Performs assignments involving research, data interpretation, analysis and formulation of recommendations. Prepares financial information and reports. Provides consultation to district administrators on findings and makes suggestions for improvements.

- M/A 15% Creates financial reporting, forecasting, and statistical analysis for the district. Assist with financial preparation of the Comprehensive Annual Financial Report (CAFR).

- M/A 9% Research, develop, perform cost analysis, and prepare narrative, graphic, and statistical summaries, exhibits, and materials for negotiations. Monitor website for Financial Transparency compliance, analyze annual budget requirements.

Ongoing 1% Perform other duties as assigned.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION AND TRAINING: Bachelor’s Degree in finance, business administration, public administration or related field required and/or equivalent years’ of experience.

EXPERIENCE: Minimum three years’ experience relevant budget experience required. Governmental accounting experience preferred but not required.

SKILLS, KNOWLEDGE, & EQUIPMENT: Analytical skills, independent judgment, and professional knowledge to accurately monitor compliance with internal policies, Board, district, state, and federal guidelines related to school finances required. Strong interpersonal, written and verbal communications and attention to detail skills. Ability to maintain confidentiality in all aspects of the job. Strong technical knowledge of accounting standards and financial statement reporting, expert competence with spreadsheet, accounting software and knowledge of computers are essential, excellent organizational skills in a complex environment, effective written and oral communication skills. Expert level Excel skills required at the time of hire. Operating knowledge of and experience with personal computers and peripherals. Operating knowledge of and experience with Microsoft Word, and PowerPoint. Expert knowledge of Excel. Operating knowledge of district financial system and student information system preferred, required within 3 months of entering position. Must be able to pass a Colorado and Federal Bureau of Investigation background check.

SUPERVISION/TECHNICAL RESPONSIBILITY: This position has no supervisory responsibilities.

JUDGMENT AND DECISION MAKING: Work is assigned by the Chief Financial Officer based on content of assignment in accordance with the job description. Decisions are made in collaboration with school principals, department leaders, senior management and charter school financial representatives. Supervisor is involved only on major decisions.

DIVERSITY OF DUTIES: This position crosses over into other areas within the building on a daily basis.

SAFETY TO SELF AND OTHERS There is minimal risk of injuries to self or others in this position.

The physical demands, work environment factors, and mental functions described below are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

PHYSICAL DEMANDS While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is occasionally required to stand, walk, and reach with hands and arms. There are no lifting requirements of this job. There are no specific vision abilities required by this job.

WORK ENVIRONMENT: The noise level in the work environment is usually quiet.

MENTAL FUNCTIONS While performing the duties of this job, the employee is regularly required to compare, analyze, communicate, copy, coordinate, instruct, compute, evaluate and use interpersonal skills. The employee will frequently be required to compile and negotiate.