

CLASS SPECIFICATION

Budget Analyst

GENERAL PURPOSE

Under general supervision, participates in the formulation, administration and revision of department and school site budgets; performs difficult and responsible analyses which support department and school functions, programs and initiatives in budget development and implementation; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

Budget Analysts perform a wide variety of statistical and management analyses associated with formulation, presentation and administration of department and school site budgets. The incumbent works with a significant degree of independence and is expected to exercise considerable latitude in selecting and applying analytical and statistical approaches and methodologies and making sound decisions regarding proposals and recommendations based on analyses performed.

Budget Analyst is distinguished from classes in the professional accounting series by the incumbent's responsibility for performing complex financial and budgetary analyses requiring in-depth understanding of the department and school funding sources and associated requirements and the District's financial and budgetary systems.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class. There will typically be an assigned schedule for these duties.

1. Participates in formulating, implementing, maintaining and administering the department and school site regular and categorical budgets and budget revisions; analyzes budgets and projects to determine year-end balances, verify compliance and establish most effective use of all funds; prepares employee costs analyses and projections; monitors budget expenditures for potential problems; meets at least twice annually with departments and school sites to evaluate budget status; prepares and assists in posting budget expenditures, transfers and reallocations; monitors budgets for posting or coding entries and makes corrections; maintains budget and grant information, files and records; answers questions and provides support, information and reports to department and school site personnel.
2. Assists with year-end processes for categorical budgets within established timelines; analyzes budgets to maximize use of all funds; closes fund accounts according to District and grant carryover guidelines; prepares detailed notes for year-end financial statements; ensures school sites are in compliance with grant regulations; formulates alternative plans for closing out budgets.
3. Analyzes categorical purchase orders to ensure compliance with grant guidelines and correct coding; approves purchase orders; monitors budget levels to ensure purchases are within budget levels.
4. Prepares, generates and mails invoices to external agencies; compiles and verifies supporting documentation; reconciles and tracks invoices and payments.
5. Maintains construction-in-progress project accounts; tracks payments ensuring accurate account coding; prepares budget adjustments; prepares year-end and project-end closings.

6. Creates, updates and troubleshoots models for data downloads to increase efficiency, accuracy and consistency of data interpretation.
7. Assists in conducting informational workshops for District staff on accounting and budget processes, including preparing presentation handouts and materials, registering attendees and participating in making presentations.
8. Gathers and prepares monthly, quarterly and annual funding reports for Average Daily Attendance, Class Size reduction, Special Education and Extended Learning programs.
9. Prepares and submits required state and county reports (including J-7, J-7CSR, J-18/19, etc.) and meets all deadlines.
10. Provides school enrollment/average daily attendance analysis and prepares P-2 estimates.
11. Performs accounting and budgeting functions related to Fixed Assets and Call Accounting System.
12. Monitors District funds other than the General Fund and prepares transfers.
13. Participates and provides support for Medi-Cal Administrative Activities Fiscal reporting.

OTHER DUTIES

1. Provides analytical support for special projects as assigned.

QUALIFICATIONS

Knowledge of:

1. Theory, principles, practices and techniques of public school and grant budget development and administration.
2. County, state and federal law and regulations applicable to areas of assigned responsibility.
3. Computer tools and software, particularly as related to statistical analysis, modeling, data management and manipulation.
4. Principles, practices and methods of administrative, budgetary, economic and procedural analysis.
5. Principles and practices of sound business communication; correct English usage, including spelling, grammar and punctuation.
6. The County's financial system, its usage and requirements.

Ability to:

1. Operate a personal computer and spreadsheet, word processing, financial modeling and other standard software.
2. Analyze budget and financial information and make sound recommendations within areas of responsibility under intensive deadlines.

3. Understand, interpret, explain and apply federal, state, local and District laws, regulations and policies regulating budget development and administration and financial reporting and recordkeeping.
4. Select appropriate methodologies and perform mathematical and statistical calculations and analyses.
5. Prepare clear, concise and comprehensive financial and budget analyses, reports and presentation materials.
6. Exercise sound independent judgment within general policy guidelines.
7. Make clear, effective oral presentations to groups and individuals.
8. Establish and maintain effective working relationships with District managers, staff and others encountered in the course of work.

Education, Training and Experience:

Graduation from a recognized four-year college or university with a major in finance, business administration, public administration or a closely related field preferred; and at least three years of progressively responsible experience performing financial, statistical and budgetary analyses, preferably in a governmental agency.

Licenses; Certificates; Special Requirements:

A valid California Class C driver's license, a good driving record and the ability to maintain insurability under the District's vehicle insurance policy.

Upon acceptance of the District's offer of employment, new hires may be required to complete a baseline physical examination prior to the first day of employment.

PHYSICAL AND MENTAL DEMANDS

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

Physical Demands

While performing the duties of this class, an employee is regularly required to sit; talk or hear, in person and by telephone; use hands repetitively to finger, handle, feel or operate computers and standard office equipment; and reach with hands and arms. An employee is frequently required to walk and stand and to regularly lift up to 25 pounds.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, an employee is regularly required to use written and oral communication skills; read and interpret financial and statistical data, information and documents; analyze and solve problems; use math and apply mathematical reasoning and abstract statistical concepts; observe and interpret people and situations; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines; and interact with Board members, District managers, staff and others encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions and the noise level is usually quiet.

Board Approval 10/2/2008