

## BUDGET ANALYST

### DEFINITION

Under direction, maintain a position control system for all categorically funded positions; prepare California State Department of Education Annual Financial Reports (CAT & TRAN); prepare Federal and State fiscal reports for district grants and entitlements; perform a wide variety of budgeting and analyst duties in support of the budget development and control function of the District Business Services Division; confer with District office and school site administrators to develop and implement sound fiscal operations; maintain complex financial or statistical records; provide technical support to the Fiscal Services Director, Accounting Supervisor, department staff and other departments; perform related duties and responsibilities as required.

### ESSENTIAL FUNCTIONS

Continuously monitor position control and all personnel changes; review Board minutes for items which may impact the budget and position control; assist in the preparation of the District's budget; interact closely with the Director, Fiscal Services, program managers, and other District personnel with regard to changes in the budget; compile information for and assist in budget projections; oversee daily operations and coordinate work activities of members of work unit; budget carry-over monies to respective programs with appropriate restrictions; prepare Federal and State financial statements and reports; perform a variety of research and other analytical methods in assisting departments to implement various programs; reconcile revolving fund accounts; perform data entry into financial data base; compile data and prepare a variety of reports for both internal and external use; resolve or assist in resolving discrepancies in accounting data; notify appropriate District personnel of appropriation, expenditure and account balances and of any problems encountered; maintain accounting records in auditable condition; perform related duties of equal complexity as assigned.

### EMPLOYMENT STANDARDS

#### KNOWLEDGE AND ABILITIES

##### Knowledge of:

Laws and regulations applying to school district accounting operations as delineated by the California School Accounting Manual and the State Education Code;  
Principles and methods of budgeting for school districts;  
Standard methods, practices, and terminology used in bookkeeping and financial record keeping;  
General office practices, procedures, and terminology;  
Double entry bookkeeping methods and complex mathematical computing and record checking;  
Financial and fiscal preparation and format;  
Standard office machines, equipment, and computers.

##### Ability to:

Learn and interpret specific laws, District regulations and policies, and apply them with good judgement in a variety of procedural situations;  
Control school district budgets;  
Establish and maintain fiscal records and procedures;  
Independently to prepare clear and concise statistical, fiscal statements and summaries and narrative reports accurately;  
Conduct technical analysis using various analytical techniques;  
Analyze situations and adopt an effective course of action of resolution;

Ability to:

Establish and meet deadlines;  
Make and verify complex mathematical calculations with speed and accuracy;  
Effectively operate standard office equipment, including computer and peripheral equipment;  
Understand and follow oral and written instructions;  
Communicate effectively orally and in written form;  
Work with a minimum of supervision;  
Learn and adapt to new procedures, systems, and policies;  
Remain flexible under the pressure of a heavy workload and critical deadlines;  
Establish and maintain an effective working relationship with those contacted in the course of work;  
Relate effectively with racially and ethnically diverse staff, students, and community.

Skills:

Type accurately from clear copy. Proficient operation of standard office equipment including computer and peripheral equipment. Proficient execution of spreadsheet applications.

EDUCATION AND EXPERIENCE

Education:

Equivalent to the completion of the twelfth grade, supplemented by coursework or training in accounting, budget planning, business management, or closely related fields.

Experience:

Five years of responsible accounting and fiscal record management and reporting experience, preferably including three years of performing specialized functions pertaining to program fund accounting and management.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS

Strengths:

Work may involve lifting objects up to 50 pounds. Physical dexterity in limbs and digits necessary to operate general office equipment.

Pre-placement Physical: Class I