



**JULY 2009**  
**FLSA: EXEMPT**

## **BUDGET ANALYST**

### **DEFINITION**

Under general direction, performs professional-level finance and accounting work in the development and monitoring of the District's operating budget; reviews, monitors, adjusts, and controls the ongoing operating budget after adoption; provides highly responsible and complex administrative support to the Chief Business Officer; provides expert professional assistance to District management staff in areas of expertise; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from the Chief Business Officer. Exercises technical and functional direction over and provides training to lower-level staff.

### **CLASS CHARACTERISTICS**

This classification participates in the development and monitoring of the District's operating budget. The incumbent organizes and oversees day-to-day activities and is responsible for providing professional-level support to the Chief Business Officer in a variety of areas. Successful performance of the work requires an extensive professional background as well as skill in coordinating assigned work with other divisions and departments. This class is distinguished from the Accountant in that the latter is responsible for professional accounting work, including auditing, analyzing, and verifying fiscal records and reports, and preparing financial and statistical reports. This class is further distinguished from the Accounting Supervisor in that the latter is responsible for supervising the maintenance of accounting and financial records for the District as well as overseeing the work of paraprofessional accounting staff.

### **EXAMPLES OF ESSENTIAL JOB FUNCTIONS** (Illustrative Only)

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Plans, coordinates, and oversees the daily activities related to the preparation of the District's annual budget.
- May participate in the selection of, train, motivate, and evaluate assigned personnel; provides or coordinates staff training in the budget process; provides direction to professional and technical accounting staff in a wide variety of financial and budgetary operations, processes, and analyses.
- Coordinates the preparation and administration of the annual budget for the District; calculates cost distribution and provides financial forecasting and planning; tracks the adopted budget and prepares periodic budget reviews for submission to District departments and management.
- Formulates, prepares, and communicates budget completion schedules, calendars, and deadlines; coordinates the budget process and ensures timely completion.

- Participates in, reviews, and monitors long-term goals, budget objectives, and performance measures as well as multi-year forecasts of revenues, expenditures, and fund balances.
- Monitors expenditures, revenues, and budget allocations to determine the District's financial status and prepares custom reports, graphs, and schedules as needed.
- Facilitates and coordinates the resolution of cross-departmental budgetary issues, including identifying and proposing procedural solutions; reviews all departmental budget submittals for completeness, accuracy, the appropriate use of funding sources, and adherence to District policies.
- Monitors the current year's budget; balances expenditures and revenues and identifies funding gaps; may assist departments in resolving funding issues; prepares status reports and manages budgetary control systems; recommends and processes budget amendments.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of investments and general revenue; researches emerging products and enhancements and their applicability to District needs.
- Prepares a wide variety of financial and statistical reports, including year-end reporting, budgetary reports, and other legal documents and management analysis.
- Provides highly complex staff assistance to the Chief Business Officer; prepares and presents staff reports and other necessary correspondence.
- Prepares various data and reports such as adjustments, expenditure transfers, budget augmentations, revisions, transfers, and the analysis and reconciliation of transactions within various financial computer software systems.
- Works with campus and District offices to ensure timely and accurate budget reports.
- Monitors changes in regulations and technology that may affect operations; implements policy and procedural changes after approval.
- Receives, investigates, and responds to difficult and sensitive problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.
- Interprets, explains, and applies general accounting/auditing principles and procedures, laws, and regulations affecting the District's financial operations.
- Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Finance and accounting principles and procedures, including developing, implementing, and administering a large budget.
- Procedures, policies, rules, and practices affecting the development, maintenance, and control of fiscal record keeping systems, including automated finance and accounting systems.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Organization and management practices as applied to the development, analysis, and evaluation of programs and operational needs of the assigned function.
- Recent and on-going developments, current literature, and sources of information related to the operations of the assigned function.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and computer applications related to work, including word processing, database, and spreadsheet software.
- Principles and practices of data collection and report preparation.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, various socio-economic and ethnic groups.

**Ability to:**

- Prepare, implement, administer, and monitor large budgets.
- Analyze, interpret, summarize, and present financial, administrative, and technical information and data in an effective manner.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Interpret, apply, explain, and ensure compliance with Federal, State, and local policies, procedures, laws, and regulations.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Understand and carry out a variety of complex instructions in a responsible and independent manner.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to graduation from an accredited four-year college or university with major coursework in accounting, finance, business or public administration, or a closely related field and three (3) years of responsible professional accounting/finance experience, including one (1) year of experience in the development and management of large budgets.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.