



BUDGET ANALYST, SENIOR

DEFINITION

Under general direction, prepares and maintains the District's annual operating budget; performs the full range of complex professional accounting duties and financial analysis involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned funds and accounts; prepares, audits, and maintains a variety of manual and automated financial and statistical records, reports, and financial statements; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. Exercises technical and functional direction and provides training to other staff.

CLASS CHARACTERISTICS

This is an advanced journey-level and specialized class that performs a variety of professional duties in support of the District's accounting and budgeting systems at the District level. Incumbents work under general direction and exercise a high level of discretion and independent judgment in performing the full range of routine to complex accounting and financial record keeping functions. Successful performance of the work requires extensive knowledge of governmental accounting practices and procedures, fund accounting, and fiscal management. This class is distinguished from the Budget Analyst in that the latter is responsible for budgetary related duties at the campus level.

EXAMPLES OF TYPICAL FUNCTIONS (Illustrative Only)

- Establishes District's annual operating budget; monitors and maintains adopted budget on an ongoing basis.
- Performs a full range of complex professional accounting duties and financial analysis involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned funds, budgets, and accounts.
- Performs budget to actual variance analysis for various funds and programs; identifies and explains variances.
- Calculates, codes, posts, and adjusts journal entries; updates accounts to reflect revenue and expenditures; balances and audits accounts for errors and makes appropriate adjustments.
- Monitors, reviews, initiates, and processes transfers between funding sources.
- Prepares, maintains, and audits a variety of financial and statistical reports, statements, and records; reviews and analyzes financial records and reports to ensure accuracy, completeness, and compliance with established guidelines, procedures, and Generally Accepted Accounting Principles.
- Provides professional and technical assistance in the preparation and analysis of budget, accounting, and other fiscally related issues for other departments; coordinates the implementation of the budget process; trains District personnel on budget preparation policies and procedures; disseminates adopted budget.

- Adapts accounting and record keeping functions to computerized accounting systems; analyzes records of financial transactions to determine accuracy and completeness of entries and makes additions and corrections.
- Analyzes District procedures to ensure compliance with board policies, Education Code provision, and other state, federal, and miscellaneous regulations; administers District budget policies.
- Assists in the establishment of departmental procedures and District-wide processes.
- Provides technical and functional direction to other department staff including providing guidance and assistance in problem resolution.
- Researches and resolves issues related to assigned funds and accounts.
- Attends and participates in various meetings as assigned.
- Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Basic principles and practices of employee supervision.
- Generally accepted accounting principles.
- Governmental and/or fund accounting principles and procedures and District accounting system requirements and procedures.
- Principles of budget preparation, analysis, and monitoring.
- Methods and techniques of auditing, verifying, balancing, and reconciling accounting records.
- Principles and practices of fiscal, statistical, and administrative record keeping and reporting.
- General principles and practices of data processing and its applicability to accounting and municipal operations.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Computer applications related to work, including word processing, database, and spreadsheet software.
- Applicable federal, state, and local laws, rules, regulations, ordinances, and organizational policies and procedures relevant to assigned area of responsibility.
- Modern office practices, methods, and computer equipment and software relevant to work performed.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, students, and District staff, including individuals of diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation.

Ability to:

- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation of community college students, faculty and staff.
- Perform a variety of professional accounting duties involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned accounts.
- Prepare and analyze comprehensive financial statements and accounting reports.

- Calculate, post, audit, and adjust journal entries including income and expenditures.
- Reconcile various fiscal statements to ensure accurate fund accounting as assigned.
- Analyze financial data and draw sound conclusions.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Analyze, interpret, summarize, and present administrative and technical information and data in an effective manner.
- Train and provide guidance to District staff on budget matters.
- Conduct research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Make accurate arithmetic, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Organize work, set priorities, meet critical time deadlines, and follow-up on assignments.
- Effectively use computer systems, software, and modern business equipment to perform a variety of work tasks.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgement within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective 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, business administration, or directly related field, and three (3) years of increasingly responsible accounting or budget analysis experience.

Licenses and Certifications:

None.

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. Standing in and walking between work areas is frequently 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 frequently bend, stoop, kneel, and reach to perform assigned duties, as well as 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 20 pounds with the use of proper equipment. Reasonable accommodations will be made for individuals on a case-by-case basis. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

Salary Grade: C1-64

FLSA: Non-Exempt

EEO Code: H-

Board Approved: April 2021