



BUDGET ANALYST

DEFINITION

Under direction, coordinates and performs the full range of professional and technical budget analysis functions; prepares and maintains budgets for assigned funds and accounts; conducts budget and financial studies; prepares various statements and reports; provides advice and professional support to various campus staff with cost analysis, fiscal allocation and budget preparation; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is a journey-level and specialized class that performs a variety of professional duties in support of the District's accounting and budgeting systems at the campus level. Incumbents perform the full range of duties as assigned, working independently, and exercising judgement and initiative. This class is distinguished from the Senior Budget Analyst in that the latter is responsible for the more complex budgetary related duties at the District level.

EXAMPLES OF TYPICAL FUNCTIONS (Illustrative Only)

- Prepares and maintains campus operating budget; codes transactions to appropriate budget numbers.
- Performs a variety of complex and technical budget 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.
- Maintains and reviews college revenue and expenditures; balances and audits accounts for appropriate use of funds and makes necessary adjustments.
- Monitors and processes budget transfers between funding sources.
- Prepares, maintains, and audits a variety of financial and statistical reports, statements, and records related to assigned funds and accounts; reviews and analyzes financial records and reports to ensure accuracy, completeness, and compliance with established guidelines, procedures, and Generally Accepted Accounting Principles.
- Provides technical assistance in the preparation and analysis of budget, accounting, and other fiscally related issues for other departments in the District; serves as a resource for college staff in obtaining reports and information from the District financial system; administers budget policies and procedures.
- 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:

- 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 District 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.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Modern office practices, methods, and computer equipment and software relevant to work performed.
- 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 financial 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 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.

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: C1-58

FLSA: Non-Exempt

EEO Code: H-

Board Approved: April 2021