



Budget Analyst

Classified Range: 54
Board Approved: 11/18/21 P. 1|4

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job; however, any additional duties will be reasonably related to this class.*

SUMMARY DESCRIPTION

Performs a variety of technical budget analysis functions; provides advice and technical assistance with cost analysis, fiscal allocation and budget preparation.

SUPERVISION RECEIVED AND EXERCISED

Receives minimal direction from supervisor; works from procedures and best practices on general objectives; refers only specific matters to supervisor. May provide technical and functional direction to student workers.

REPRESENTATIVE DUTIES

The following duties are typical for this classification.

1. Performs a variety of technical budget analysis; compiles and analyzes data, prepares financial, budgetary and statistical studies and reports.
2. Assists in the development of the budget calendar or schedule, developing budget worksheet instructions, and in the preparation of District budget; produces budget worksheets; reviews budget worksheets for accuracy and completeness; presents budget materials to appropriate administrator for review.
3. Processes and maintains all files for budget transfers and budget adjustments and provides all necessary documentation as required for audits.
4. Performs account analysis for categorical programs; audits all categorical program claims and reports; analyzes and reconciles data for accuracy; gathers necessary signatures.
5. Assists in allocations, tracking and reconciliation of categorically funded budgets; ensures adherence to categorical and contract guidelines; monitors for compliance with District and funding agency policies.
6. Prepares all financial reports for federal, state and local funding sources in accordance with specific formats and established accounting principles; maintains files related to reports.
7. Assists with monitoring of District finances; maintains and reviews District revenues and expenditures; recommends corrective action for negative budget and/or projected negative budgets.
8. Prepares a variety of reports and required and serves as a resource for District staff in obtaining reports and information from the District financial system.
9. Maintains the District-wide position control systems; monitors and assigns proper account and coding.
10. Assists and responds to questions and requests for information from students, staff and the public; answers questions that involve searching for and abstracting technical data; provides detailed explanations and interpretation of laws, rules and regulations as well as policies and procedures related to budgets.



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11. Assists in controlling operations of various segments of the accounting system; assists staff in implementing and completing a variety of computer data entries; provides guidance and assistance on budgeting procedures and practices.
12. Performs other duties related to the primary job duties.

MINIMUM QUALIFICATIONS

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

CORE COMPETENCIES:

Professional Integrity and Ethics

- Follows a clear-cut set of rules
- Understands practical necessity of rules and ethical guidelines
- Shows consistency in behavior and judgement over a long term and varied situations

Legal and Regulatory Navigation

- Understanding, interpreting, and ensuring compliance with laws and regulations
- Locates, understands, or provides factual regulator information**
- Works within the bounds and limits of what is permissible

Using Technology

- Working with electronic hardware and software applications
- Using basic features and functions of software and hardware
- Experiments and finds novel uses for standard features and functions **
- Adds, improves, modifies, or develops features and functionality**

Team Work/Involving Others

- Collaborating with others to achieve shared goals
- Engages others for suggestions and ideas

Writing

- Communicating effectively in writing
- Using correct writing mechanics including spelling, vocabulary, grammar, syntax, punctuation, capitalization, sentence structure
- Logically orders and structures ideas and progression of thought

Analyzing and Interpreting Data

- Apply sorting, coding and categorizing rules



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- Analyze data
- Read reports
- Draw meaning and conclusions from quantitative and/or qualitative data

Customer Focus

- Attending to the needs and expectations of customer
- Seeks information about the immediate and longer term needs of the customer
- Anticipates what the customer may want or expect in a product or service
- Works across organizational boundaries to meet customer needs **

Reading Comprehension

- Understanding and using written information
- Knows the meaning of printed words; comprehend the literal meaning of text
- Make interpretations, applications, deductions, inferences, extrapolations from written information **

Professional and Technical Expertise

- Applying technical subject matter to the job **
- Knows the rudimentary concepts of performing the essential technical operations

Critical Thinking

- Analytically and logically evaluates information to resolve problems
- Follow guide, SOP or other step by step procedures for locating the source of a problem and fixing it
- May detect ambiguous, incomplete, or conflicting information or instructions**

Attention to Detail

- Focusing on the details of work content
- Shows care and thoroughness in adhering to process and procedures that assure quality
- Applies knowledge and skill in recognizing and evaluating details of work**
- Applies skilled final touches on products

Mathematical Facility

- Performs operations involving counting, adding, subtracting, multiplication and division
- Follow multi-step computational procedures and apply formulas
- Apply basic algebraic or geometric reasoning and problem solving
- Recognize approaches and algorithms for finding real world computational solutions**
- Computes and interprets descriptive statistics**



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Valuing Diversity

- Shows acceptance of individual differences
- Welcomes input and inclusion of others who may be different from oneself
- Shows understanding and empathy for the challenges of groups seeking inclusion or dealing with perceived discrimination

*** Lead, Advanced or Senior Level Positions*

Education and Experience Guidelines

Education/Training:

- An Bachelor's degree from an accredited college or university with major course work in accounting, finance or a related field.

Required Experience:

- Five (5) years of increasingly responsible accounting and/or budgeting experience that includes two (2) years of experience in fund or public agency accounting.

EQUIVALENCY PROVISION

In the absence of a Bachelor's degree, an Associate's degree or sixty (60) semester units from an accredited college or university with major course work in accounting, finance, or a related field and seven (7) years of increasingly responsible accounting and/or budgeting experience, including two years of experience in fund or public agency accounting is qualifying.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to occasionally lift, carry, push, and/or pull light to moderate amounts of weight up to 25 pounds; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

Vision: See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; and to operate assigned equipment.

Hearing: Hear in the normal audio range with or without correction.