

DATE: APRIL 2024
FLSA: NON-EXEMPT
SALARY: GRADE P

CBA DESIGNATION: CLASSIFIED BARGAINING UNIT

BUDGET ANALYST

BASIC FUNCTION

Assists in the planning, coordination, development, and maintenance of the District's budget; formulates, maintains, and verifies complex financial, statistical, and budgetary analysis of the District's resources; performs a variety of quantitative and qualitative analytical tasks requiring unique and authoritative expertise; maintains and monitors position control for the District.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned area supervisor. May provide lead direction to temporary staff and/or student workers.

CLASS CHARACTERISTICS

This classification in the Fiscal series is responsible for independently performing professional duties in support of District budget development and implementation. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgment to evaluate and make determinations on budgetary decisions. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

EXAMPLES OF TYPICAL JOB FUNCTIONS

1. Collaborates in the planning, coordination, development, and maintenance of the District's annual tentative and final budgets for all resources in accordance with the District budget allocation model; inputs data into the District's financial database; performs financial projections; and maintains current and historical data, including funding allocation formulas and spending patterns.
2. Maintains position control to track permanent, vacant, and new positions; monitors permanent salary accounts for salary savings; prepares reports related to salary and benefit costs.
3. Prepares documents for Board of Trustees presentations.
4. Reviews and evaluates all District and college budget and expenditures for accuracy/appropriateness; reviews and researches journal entries and adjustments; processes District and college budget and expenditure transfers; develops and maintains budget controls; monitors budget items and provides recommendations on budget allocations.
5. Performs high level problem solving, forecasting, and statistical and trend analysis of financial data and use of funds for the operating budgets of facilities, restricted funds, personnel, special revenue sources, and self-insurance funds; recommends adjustments in program spending.
6. Maintains general knowledge of grant contractual provisions and requirements; advises and collaborates with grant program directors as necessary; assists with the establishment of grant budgets; monitors revenue and expenditures; assists in the reporting and billing process; develops reporting mechanisms and tools.
7. 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, funding source requirements, and Generally Accepted Accounting Principles (GAAP).
8. Performs a variety of technical and analytical tasks related to the monitoring and administration of State and local bond construction projects, including monitoring contract financial data/cash flow

analysis/budgets/spending analysis, and reconciliation and filing reimbursement claims through the State facility management database.

9. Provides technical assistance in managing fiscal resources, budgetary solutions, and financial management as appropriate.
10. Assists other departments in the fiscal year-end closing process; prepares and closes grants, calculates carry-over, reconciles revenues and expenditures, creates financial accruals, and resolves any irregularities.
11. Maintains and upholds the District's chart of accounts for all District financial systems in accordance with the guidelines of the California Community Colleges Chancellor's Office Budget and Accounting Manual.
12. Provides recommendations regarding modifications, automation, and enhancements on department systems, processes, and/or procedures.
13. Acts as liaison regarding software applications with the County office and participates in meetings with District departments and outside agencies.
14. Participates in District-provided in-service training programs.
15. Performs other related duties as assigned; specific duties not listed does not exclude them for this classification if the work is similar or related.

QUALIFICATIONS

Knowledge of:

1. Generally Accepted Accounting Principles (GAAP).
2. Governmental and/or fund accounting principles and procedures and accounting system requirements and procedures.
3. Financial accounting systems.
4. Federal and state financial reporting systems and processes.
5. Principles of budget preparation, analysis, and management.
6. Principles and practices of accurate position control management.
7. Methods and techniques of maintaining charts of accounts.
8. A diverse range of funding mechanisms used in operations.
9. Applicable federal, state, and local laws, rules, regulations, ordinances, and policies and procedures.
10. Research and reporting methods, techniques, and procedures.
11. Technical report writing and preparation of correspondence.
12. Methods, practices, principles, procedures, and terminology used in accounting and finance.

Ability to:

1. Utilize quantitative and qualitative statistical analysis for information gathering and reporting.
2. Perform a variety of professional financial duties involved in reviewing, analyzing, auditing, reconciling, and maintaining assigned budgets.
3. Prepare and analyze comprehensive financial statements and accounting reports.
4. Calculate, post, audit, research, and adjust journal entries including income and expenditures.
5. Reconcile various fiscal statements to ensure accurate fund accounting as assigned.
6. Analyze financial data and draw sound conclusions.
7. Make recommendations regarding financial impact and formulate and recommend revisions to financial processes and procedures as needed to ensure effective and efficient operations.
8. Work under the pressure of recurrent and critical deadlines.
9. Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
10. Effectively represent the department and the District in assigned meetings.

11. Independently organize work, set priorities, meet critical deadlines, and follow up on assignments.
12. Exercise independent judgment within general policy, and procedural guidelines.
13. Effectively use computer systems, software applications relevant to work performed, and business equipment to perform a variety of work tasks.
14. Communicate effectively in the course of performing work tasks.
15. Establish, maintain, and foster effective working relationships with those contacted in the course of work.
16. Demonstrate clear evidence of sensitivity and understanding of the diverse academic, socio-economic, disability, and ethnic backgrounds of students, staff, and the community.
17. Provide efficient, high-level customer service to the public, vendors, contractors, and District personnel.

Education and Experience:

A bachelor's degree with major coursework in accounting, finance, public administration, statistics, business administration, or a related field is required and four (4) years of increasingly responsible experience in budget, finance, and/or accounting administration; or an equivalent combination of education, training, and/or 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. This classification primarily works in an office and 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. Employees 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.

The essential functions of this classification must be performed by the incumbent with or without reasonable accommodations.

ENVIRONMENTAL CONDITIONS

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 individuals in interpreting and enforcing departmental policies and procedures.