

North Monterey County Unified School District

CLASSIFIED POSITION DESCRIPTION

Position Title:	BUDGET ANALYST
Job Family	Accounting/Fiscal
Reports to:	Assistant Superintendent – Business Services or Designee
Salary Level:	Range 36
Calendar:	Classified 12 Month

SUMMARY

Under the direction of the Assistant Superintendent – Business Services or designee, perform professional work of average difficulty in the preparation and control of the District's expenditure budget or of Federal, State, and Local programs, and to do job related work as required.

MAJOR DUTIES AND RESPONSIBILITIES: To perform a job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed in the job description are representative of the knowledge, skills and/or abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Analyzes budget transfers.
- Assists program and site-based managers in preparing and revising budgets.
- Assist Cabinet, program managers and site administrators with evaluation and reporting requirements of state and federal categorical programs to ensure their accurate completion in a timely manner.
- Works in conjunction with the Human Resources department to ensure that the position control database is reflective of the District's personnel situation.
- Audits various accounts, records and systems for the purpose of identifying discrepancies, resolving problems and issues and/or ensuring conformity to State, Federal and District accounting requirements.
- Maintains a variety of manual and electronic files and/or records (e.g. cost analyses, payroll data, financial reports, budgets, etc.) for the purpose of maintaining up-to-date trail for reference and ensuring compliance with established regulations.
- Reviews items (e.g. program budget numbers, object numbers, income numbers and balances) for the purpose of maintaining financial records and systems in fiscal compliance with guidelines, policies and procedures.
- Keep various financial or statistical records requiring the use of independent judgment.
- Compares, schedules, indexes, and files bills, vouchers, warrants, and other records.
- Makes mathematical calculations.
- Prepares and checks various statistical or accounting tables.
- Keeps journals or subsidiary ledgers.
- Operates computers and standard office machines.
- Provides information for callers.
- Interprets and provides information, verbally and in writing, regarding district policies and programs.
- Receives and maintains claims and related reports.
- Assists in the preparation and projection of assigned budgets.
- Confers with appropriate public and private program representatives.
- Compares vendors' products and pricing.

Other Duties:

- Attends meetings related to assignment.
- Participates in available training to meet new safety and/or technology standards.
- Performs other related duties as may be assigned by the supervisor.
- Maintains a calendar of state and federal categorical reporting requirements and timelines to ensure compliance.

PHYSICAL AND MENTAL REQUIREMENTS

Physical, mental and emotional stamina to perform the duties and responsibilities of the position; mental acuity to collect and interpret data, evaluate, reason, define problems, establish facts, draw valid conclusions, make valid judgments and decisions; Manual dexterity sufficient to write, use the telephone, computer, calculator, and office machines at required speed and accuracy; vision sufficient to communicate in person and hold telephone conversations in normal range (approx. 60 decibels); speaking ability in an understandable voice with sufficient volume to be heard in normal conversational distances on the telephone and addressing groups; physical agility to sit, stand, kneel, walk, push/pull, squat, twist, turn, bend, stoop, and to reach overhead; physical stamina sufficient to sustain light physical labor for up to 8 hours, sit and/or walk for prolonged periods of time; physical mobility sufficient to move about the work environment (office, district, school site to site) for sustained periods of time on hard flooring, climb slopes, stairs, ramps, and to respond to emergency situations; physical strength sufficient to periodically lift and/or carry 25 pounds of materials or supplies; occasionally lift 40 or more pounds with assistance; work in an indoor work environment

REQUIRED QUALIFICATIONS

Education and Experience:

- Any combination of education or equivalent experience to a bachelor's degree in business, finance, or accounting as well as training/experience in categorical program requirements.
- Any combination of experience that would involve four (4) years of experience in the preparation and maintenance of financial and statistical records, accounting operations and/or budgetary operations.

Knowledge of:

- Methods and practices of financial record keeping, including journal, ledger accounts systems, budget account systems, and electronic spreadsheets.
- General office clerical skills and practices.
- Accounting, bookkeeping, or finance comprehension.

Ability to:

- Understand and carry out assigned work with minimal supervision.
- Develop operational reports and recommendations.
- Coordinate the preparation, analysis, and monitoring of a large budget, meet with various managers to discuss spending plans and assist in the management of those plans.
- Gather, organize and analyze complex statistical and financial data.
- Make mathematical calculations with speed and accuracy.
- Use initiative and judgment in discussing problems with the public and district staff, involving office practices and policies.
- Read, understand, interpret, and follow laws, rules, regulations, processes, policies, and methods of the office, the District, and the State of California.

- Learn and use technology and computer software applications as appropriate to the work environment.
- Maintain accurate and neat records and reports.
- Compose forms of written communication from oral and written instructions.
- Understand and be sensitive to those of culturally and linguistically diverse backgrounds.
- Communicate effectively in the English language, both orally and writing.
- Learn, plan, formulate and execute federal, state, district, and departmental policies, procedures and directives, in accordance with assigned duties.
- Use alpha/numeric keyboard and standard office equipment effectively with a reasonable rate of speed and accuracy.
- Meet schedules and timelines.
- Establish and maintain co-operative relationships with those contacted during the performance of required duties.


DESIRABLE QUALIFICATIONS

- Previous experience in a school district or government accounting office.

The information contained in this job description is for compliance with the Americans with Disabilities Act (A.D.A.) and is not an exhaustive list of the duties performed.

CSEA and DISTRICT AGREEMENT

CSEA  DATE 6-12-18

DISTRICT  DATE 6/12/18

Board Approved: May 24, 2018