

## VISTA UNIFIED SCHOOL DISTRICT

### BUDGET ANALYST

#### **Purpose Statement**

The purpose of a Budget Analyst is to provide support to department activities with specific responsibility for assisting in the formulation, analysis, and execution of the annual budget; identify budget variances and recommending appropriate actions to comply with fiscal requirements and budget guidelines; analyze costs of programs and services; provide support for negotiations; and provide analytical information as required by administrative and program personnel and/or regulatory agencies.

This job reports to the Executive Director of Fiscal Services.

#### **Essential Functions**

- Advises and provides information, analysis, and recommendations to administrative staff of the implications of funding alternatives, proposed program adjustments, and revenue options for the purpose of providing assistance to all levels of management in the resolution of budget variances and other financial issues.
- Analyzes a variety of financial information (e.g. budget reports, expenditures, variances, projections, etc.) for the purpose of identifying budget variances, compiling statistical information, identifying long-term budgetary goals, and/or conforming to established guidelines.
- Assigns fund, resource, object, and program budget numbers for the purpose of maintaining chart of accounts and financial records and systems in compliance with district, federal, state, and local guidelines, policies, and procedures.
- Assists a variety of external agency personnel (e.g. auditors, grant representatives, regulatory agency staff, etc.) for the purpose of providing information and general support.
- Assists staff with technical budgeting issues for the purpose of preparing the information and data required for developing budgets, controlling expenditures, and/or preparing budget revisions.
- Compiles statistical and budget data from a wide variety of sources for the purpose of developing budget recommendations, providing summaries, and/or ensuring compliance with established regulatory guidelines.
- Conducts meetings for the purpose of providing technical assistance and collaborating in the budget development process.
- Develops special and regular financial reports for the purpose of summarizing budget and financial data for management use in the decision-making processes.
- Maintains a variety of manual and electronic fiscal information, files, and records (e.g. account structure, current and historical budget data, financial records, planning, compliance, etc.) for the purpose of providing an up-to-date reference and audit trail.
- Participates in meetings, workshops, and seminars for the purpose of conveying and/or gathering information required to perform functions.
- Participates in pre-negotiation planning sessions, strategy development, negotiation sessions, and caucuses with all bargaining units for the purpose of budget analysis and achieving District objectives.

- Prepares a wide variety of materials for the purpose of documenting activities and issues, meeting compliance requirements, providing audit references, and providing supporting materials for requested actions.
- Prepares budgets, including working with program administrators in developing and maintaining program budgets for the purpose of providing budgetary information in compliance with established regulatory guidelines.
- Prepares cost analysis of bargaining proposals for all bargaining units related to salary and benefit increases and decreases, staff reductions, proposed reductions in work years, and comparative data for negotiations purposes that relate to management proposals and positions for the purpose of analyzing management proposals and positions at the bargaining table.
- Processes budget-related documents (e.g. journal entries, account transfers, encumbrances, etc.) for the purpose of updating and distributing information, authorizing for action and/or complying with established accounting practices.
- Provides management information and analysis for all financial impact of labor negotiation issues for the purpose of preparing management proposals for bargaining sessions.
- Responds to a variety of inquiries regarding financial procedures for the purpose of providing information, direction, and/or referral for addressing inquiry.
- Supports assigned administrator for the purpose of collaborating with administrator in the achievement of department, program, and district goals.

### **Other Functions**

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, highly complex, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include:

- adhering to safety practices;
- analyzing budgets;
- applying job-related codes, regulations, and laws;
- classifying data and/or information;
- compiling and analyzing financial and statistical information and data;
- operating standard office equipment and office technology;
- performing accounting procedures;
- performing bookkeeping procedures;
- preparing and maintaining accurate records;
- using office software applications including word processing, spreadsheets, presentation, and databases.

KNOWLEDGE is required to

- perform algebra and/or geometry;
- review and interpret highly technical information;
- write technical materials and/or speak persuasively to implement desired actions;
- present information to others;
- analyze situations to define issues and draw conclusions;

- understand complex, multi-step written and oral instructions.

Specific knowledge based competencies required to satisfactorily perform the functions of the job include:

- accounting and bookkeeping principles;
- business telephone and email etiquette;
- concepts of grammar, spelling, and punctuation;
- job-related codes/laws/rules/regulations/policies;
- keyboarding;
- methods of tactful, patient, and courteous interpersonal interactions;
- office equipment and technology;
- office practices and procedures;
- pertinent software programs;
- principles and procedures of accounting, including budget development, payroll, accounts payable, fixed assets, inventory, cash receipts, ASB accounting, position control, and accounts receivable;
- principles of public and fund accounting and budgeting;
- recordkeeping and record retention practices;
- school budgeting, policies, and audit procedures.

ABILITY is required to schedule a number of activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data using defined but different processes; and operate equipment using a variety of standardized methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of widely varied types and/or purposes; and utilize a variety of types of job-related equipment. Independent problem solving is required to analyze issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited. Specific ability based competencies required to satisfactorily perform the functions of the job include:

- accuracy and attention to detail;
- adapting to changing work priorities;
- analyzing issues and determining an appropriate course of action;
- communicating with diverse groups and individuals;
- displaying tact and courtesy;
- establishing and maintaining effective working relationships with others;
- maintaining confidentiality;
- making arithmetic calculations quickly and accurately;
- meeting deadlines and schedules;
- multitasking;
- organizing tasks;
- providing excellent customer service;
- reading, interpreting, explaining, and following rules, regulations, policies, and procedures;
- reading, writing, and communicating effectively in English;
- working as part of a team;
- working with detailed information/data.

## **Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; monitoring budget expenditures. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

**Work Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling and significant fine finger dexterity. Generally the job requires 70% sitting, 20% walking, and 10% standing. The job is performed in a generally clean and healthy environment.

**Experience:** Job related experience with increasing levels of responsibility is required.

**Education:** Bachelor's Degree in job-related area.

**Equivalency:** Bachelor's degree in accounting, finance, or business administration and three years increasingly responsible professional accounting experience. School district experience highly preferred.

Any other combination of education, training, and experience that could likely provide the desired skills, knowledge, and abilities may be considered.

**Retention:** In accordance with Education Code 45301, an employee appointed to this class must serve a probationary period of one hundred thirty (130) days of paid regular service (excluding days absent for illness or injury) during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.

**Required Testing**

For those candidates who meet the minimum qualifications, the assessment process will consist of any one or more of the following: Screening for most qualified candidates, Training and Experience Evaluation, a Written Test, a Performance Test, and/or a Qualifications Appraisal Interview.

**Certificates and Licenses**

**Continuing Educ. / Training**

**Clearances**

Fingerprint and Background Clearance  
Drug Test  
Tuberculosis Clearance

**FLSA Status**

Exempt

**Approval Date**

Revised: 03/14/2017

**Salary Grade**

Confidential, Range 25  
Classified, Range 68