JOB DESCRIPTION
San Leandro Unified School District

Budget Analyst - Confidential

Purpose Statement

The job of Budget Technician is done for the purpose/s of providing support to department activities with specific responsibility for assisting in the formulation, analysis and execution of assigned district budgets; identifying budget variances and recommending appropriate actions to comply with fiscal requirements and budget guidelines; analyzing costs of programs and services; providing analytical information related to attendance accounting and record keeping; and serving as a resource to District personnel in the area of budgetary policies and procedures.

This job reports to Assistant Superintendent or Director of Business Services

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Essential Functions

- Advises administrative staff and school personnel 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 financial information related to services (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.
- Assists staff with technical budgeting issues (e.g. analysis of activities in support of feasibility and prioritization of special projects, preparing interim reports, etc.) for the purpose of preparing the information and data required for developing budgets, controlling expenditures and/or preparing budget revisions.
- Analyzes and calculates budget information (e.g. position control, salary and benefit costs, budget projections, etc.) for the purposes of preparing documents for negotiations with bargaiing units; participating in negotiations related budget discussions; participating in negotiations related meetings as necessary.
- Calculates cost allocations and projections for a variety of supplies, textbooks, personnel, etc. for the purpose of determining the financial resources sufficient for program or school site needs.
- Compiles statistical and budget data (e.g. position control accuracy, Average Daily Attendance, negotiated salary increases, SACS account codes chart, etc.) for the purpose of developing budget recommendations; providing summaries; and/or ensuring compliance with established regulatory guidelines.
- Conducts meetings and workshops for new employees and administrative staff at the District Office and school sites for the purpose of providing technical assistance and collaborating in the budget development process and fund accounting.
- Coordinates the preparation of budget transfers, amendments, position control, files, etc. for the purpose of ensuring accuracy of data for decision making and/or complying with regulatory requirements.
- Develops special and regular financial reports (e.g. Special Education multi-year comparative reports, Average Daily Attendance on enrollment data, CDE SACS interim and adopted reports, etc.) for the purpose of summarizing budget and financial data for management and school official use in their decision-making processes.

- Maintains manual and electronic files, documents and records (e.g. MYP, reports, account charts, requests for expenditures, account structure, current and historical budget data, financial records, etc.) for the purpose of providing up-to-date reference and audit trail.
- Participates in unit meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.
- Prepares budgets, including working with program administrators in developing and maintaining that program budget for the purpose of providing budgetary information to administration, board members and a variety of public organization in compliance with established regulatory guidelines.
- Prepares a wide variety of written materials and electronic financial and budget information (e.g. budget variance and activity reports, financial statements, attendance reports, state mandated reports, budget extensions, procedures, etc.) for the purpose of documenting activities, providing reference, conveying information, and complying with established financial, legal and/or administrative requirements.
- 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.
- Responds to inquiries of staff and administration regarding financial procedures for the purpose of providing information, direction and/or referral for addressing inquiry.
- Serves as a resource to District personnel in the area of budgetary policies and procedures for the purpose of resolving issues, providing support, guidance and mentoring on detailed instructing for budget numbers, funding sources and proper procedures and policies for expenditures of funds.

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 need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; performing standard bookkeeping; and preparing and maintaining accurate records.

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials, and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: accounting/bookkeeping principles; financial analyses and/or budget analyses; electronic spreadsheets and worked processing; principles and objectives of budget preparation; and management evaluation and analysis.

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

job include: establishing and maintaining effective working relationships; adapting to changing work priorities; communicating with diverse groups; meeting deadlines and schedules; setting priorities; working as part of a team; and working with detailed information/data.

Responsibility

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; 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.

Working Environment

The usual and customary methods of performing the jobs functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 75% sitting, 15% walking, and 10% standing. This job is performed in a generally clean and healthy environment.

Experience	Job related experience with increasing levels of responsibility is required.
Education	High school diploma or equivalent.
Equivalency	Equivalent to completion of the twelfth grade. AA degree with emphasis in business or equivalent. Evidence of practical experience and/or post- secondary courses in computers required. Additional qualifying experience may be substituted on a year for year basis for the desirable college courses.

Required Testing	Certificates
Pre-Employment Proficiency Test	
Continuing Educ./Training	**Clearances**
	Criminal Justice Fingerprint/Background Clearance
	TB Screen

FLSA Status	Pending Board Approval	Salary Range
Non Exempt	December 8, 2015	51