

BUDGET ANALYST

*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

Under direction of the assigned administrator, performs a variety of complex and technical budget analysis functions; provides advice and technical assistance with cost analysis, fiscal allocation and budget preparation; conducts budget and financial studies, prepares various statements and reports; performs a variety of duties in support of the collective bargaining process, budgeting and financial reporting.

REPRESENTATIVE DUTIES

The following duties are typical for this classification.

1. Performs a variety of complex and technical budget analysis; compiles and analyzes data, prepares financial, budgetary and statistical studies and reports.
2. Assists in the development of budget calendar or schedule; aids in developing budget worksheet instructions; helps in the preparation of District budget; produces budget worksheet; reviews compiled budget worksheets for accuracy and completeness; presents budget materials to Director of Fiscal Services 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 the 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 budgets and/or projected negative budgets.
8. Prepares a variety of reports as 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 general public; answers questions that involve searching for and abstracting technical data; provides detailed

SAN BERNARDINO COMMUNITY COLLEGE DISTRICT
Budget Analyst (*Continued*)

explanations and interpretation of laws, rules and regulations as well as policies and procedures related to area of assignment.

11. Utilizes various computer programs and applications; enters and maintains data; generates reports from a database or in-house system; creates spreadsheets and generates reports using spreadsheet software; creates documents using word processing software.
12. Within limits of the classification, assists in controlling operations of various segments of the accounting system; assists staff in implementing and completing a variety of computer data entries; provides instruction, guidance and assistance on budgeting procedures and practices.
13. Performs related duties as required.

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.

Knowledge of:

Operations, services, and activities of the District's accounting and budgeting system and program areas.

Generally accepted accounting principles including varied technical accounting principles and practices used in the most difficult and complex financial record keeping and reporting.

Governmental and/or fund accounting principles and procedures and District accounting system requirements and procedures.

Governmental Fund Accounting, chart of accounts and internal/external financial reports

Principles of budget preparation, analysis, and monitoring.

Automated data processing as applied in accounting operations.

Procedures, policies, rules, and practices affecting the development, maintenance, and control of fiscal record keeping systems.

Methods and techniques of auditing, verifying, balancing, and reconciling accounting records.

Principles and practices used in establishing and maintaining files and information retrieval systems.

Principles and practices of fiscal, statistical, and administrative record keeping and reporting.

Mathematical principles.

Business letter writing and report preparation.

English usage, spelling, grammar, and punctuation.

Methods and techniques of effective customer service.

Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, statistical databases, and automated accounting systems.

Pertinent federal, state, and local laws, codes, and regulations.

Oral and written communication skills.

Ability to:

Perform a full range of varied technical and paraprofessional accounting.

Maintain accounting systems; develop recommendations to improve systems.

Perform the full range of accounting, fiscal, and statistical record keeping duties including to analyze and reconcile a variety of complex records.

Analyze and review financial records, reports, and related documents, identify discrepancies, and resolve complex problems related to assigned area of responsibility.

Perform mathematical calculations quickly and accurately including to add and subtract, multiply and divide, and calculate percentages, fractions, and decimals.

Understand the organization and operation of the District and of outside agencies as necessary to

SAN BERNARDINO COMMUNITY COLLEGE DISTRICT
Budget Analyst (Continued)

- assume assigned responsibilities.
- Understand, interpret, and apply general and specific administrative and departmental policies and procedures.
- Understand and apply pertinent laws, codes, and regulations as well as organization and unit rules, policies, and procedures with good judgment.
- Exercise tact and judgment in responding to inquiries and resolving difficult complaints and problems.
- Advise and provide interpretation to others on how to apply policies, procedures, and standards to specific situations.
- Type and enter data at a speed necessary for successful job performance.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Plan and organize work to meet changing priorities and deadlines.
- Work independently in the absence of supervision.
- Understand and follow oral and written instructions.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Use correct English usage, grammar, spelling, punctuation, and vocabulary.
- Make arithmetic calculations quickly and accurately.
- Understand and follow oral and written directions.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Work with and exhibit sensitivity to and understanding of the diverse academic, socioeconomic, cultural, and ethnic backgrounds of community college students and personnel, including those with physical or learning disabilities.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Education and Experience –A typical way to obtain the knowledge and abilities would be:

Education/Training:

An Associates 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 including two (2) years of experience in fund or public agency accounting.

Preferred Experience:

1. A Bachelor's degree from an accredited college or university with major course work in accounting, finance or a related field.
2. Experience in California Community College setting.

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

SAN BERNARDINO COMMUNITY COLLEGE DISTRICT
Budget Analyst (*Continued*)

setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; 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.

Board Approved: July 11, 2013

Range: 54