

## **SWEETWATER UNION HIGH SCHOOL DISTRICT**

### **CLASS TITLE: BUDGET ANALYST**

#### **BASIC FUNCTION:**

Under the direction of the Director of Fiscal Services, perform specialized and complex professional work in the development, control and analysis of assigned District grant budgets; generate a variety of budgetary and statistical reports; serve as budget liaison with various levels of District staff regarding assigned budgets; determine and monitor operating program staffing requirements.

#### **DISTINGUISHING CHARACTERISTICS:**

The Budget Analyst classification serves as a team leader and performs specialized and complex professional work in the development, control and analysis of assigned District grant budgets. The Senior Budget Analyst classification serves as a team leader and directs workflow as assigned by the Director.

#### **REPRESENTATIVE DUTIES:**

##### **ESSENTIAL DUTIES:**

Perform specialized and complex professional work in the development, control and analysis of assigned District grant budgets; assure compliance with guidelines, rules, regulations and procedures affecting budgetary actions.

Meet with program managers to formulate initial budget; assure compliance to grant criteria; monitor budget for level of expenditures and supplemental increases or decreases.

Determine and monitor operating program staffing requirements; receive personnel action requests from sites and departments; conduct research to assure staffing and budget allocations are within budgetary limits; travel to various sites to discuss allocation and expenditure levels with Principals and staff.

Generate a variety of budgetary and statistical reports, projections, estimates, studies and related information as requested; participate in the research, collection and compilation of data for financial and statistical reports, projections, estimates and studies; prepare and maintain a variety of records and reports; submit to appropriate administrator and school locations as required.

Operate a variety of standard office equipment including a copier, telephone, calculator and computer; utilize assigned software programs to generate reports and various documents.

Communicate with the Department of Education, the County Office of Education, local school districts, and granting agencies to exchange information, resolve issues or concerns and coordinate activities.

##### **OTHER DUTIES:**

Assist in the preparation of interim financial reports, the annual District budget, revenue limit computations and the preparation of Board financial reports.

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

General accounting, budget and business functions of a school district.  
Preparation, review and control of assigned budgets.  
Preparation of financial statements and comprehensive budget reports.  
Laws, rules and regulations relating to assigned activities.  
Financial analysis and projection techniques.  
Basic research methods.  
Oral and written communication skills.  
District organization, operations, policies and objectives.  
Interpersonal skills using tact, patience and courtesy.  
Modern office practices, procedures and equipment.  
Operation of a computer and assigned software.

**ABILITY TO:**

Perform specialized and complex professional work in the development, control and analysis of assigned District grant budgets.  
Perform research, data collection and statistical analysis.  
Prepare reports and financial documentation.  
Formulate, develop, prepare and maintain assigned grant budgets.  
Interpret, apply and explain applicable rules, regulations, policies and procedures.  
Compare numbers and detect errors efficiently.  
Analyze financial data and prepare reports, forecasts and recommendations.  
Operate a variety of office equipment including a computer.  
Communicate effectively both orally and in writing.  
Establish and maintain cooperative and effective working relationships with others.  
Work confidentially with discretion.  
Plan and organize work.  
Meet schedules and time lines.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: bachelor's degree in accounting, business administration or related field and two years of increasingly responsible fiscal experience with concentration in budgeting.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California Class C driver's license.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Office environment.  
Driving a vehicle to various sites to conduct work.

**PHYSICAL DEMANDS:**

Dexterity of hands and fingers to operate a computer keyboard.

Seeing to read a variety of financial documents.  
Sitting for extended periods of time.  
Hearing and speaking to exchange information.

*The Sweetwater Union High School District does not discriminate with regard to sex, race, religion, color, national origin, ancestry/ethnicity, marital or parental status, age, physical or mental disability, sexual orientation or any other unlawful consideration. SUHSD Board Policy #2224*

Office-Technical Job Description  
Adopted by BOT 1/25/03