

LOMPOC UNIFIED SCHOOL DISTRICT

BUDGET ANALYST

PURPOSE STATEMENT:

Under the direction of the Director-Fiscal Services, perform highly complex financial analysis functions in support of the Fiscal Services department; perform a variety of specialized technical accounting and budget functions; assist in the preparation, analysis and maintenance of designated budgets revenue projections, cost analysis, position control and financial reports; audit assigned funding and spending of assigned programs; develop, analyze and review data, projections, forecasts and trend analyses for expenditures and revenues; evaluate and project annual income and expenditures to determine budget requirements; prepare, maintain and assure accuracy of related budgetary and financial records and reports.

ESSENTIAL FUNCTIONS:

Perform a variety of specialized technical accounting, auditing and budget functions related to the District's accounting; perform specialized and technical work requiring the application and interpretation of data, facts, procedures and policies; compile projections and prepare preliminary budgets and final adoptions.

Analyze, audit and compile statistical information; assure fiscal solvency of assigned funds and budgets; prepare and maintain a variety of complex statistical and narrative records and reports related to audits, disbursements, budgets, requisitions and others as assigned; analyze, compile and submit reports to appropriate federal, State and other agencies; review and approve requisitions in accordance with established guidelines and policies as directed.

Prepare and provide financial data and prepare assigned portions of the annual district budget and interim reports.

Audit and perform discretionary and nondiscretionary auditing to a variety of proposed budgets to maintain accuracy and adherence to established guidelines.

Monitor assigned sections of the budget; project and analyze major items of expense of revenue and make necessary transfers and adjustments; review, analyze and adjust the budget as required.

Coordinate payroll functions including position control functions.

Maintain budget account structures to assure compliance with State law, regulations and local management needs.

Serve as a lead technical resource to District personnel concerning account codes and related fiscal services operations; respond to inquiries and provide detailed and technical information by phone, e-mail, on-site, or remote access.

Coordinate budget data and related statistical information of documents and provide budgetary information to other agencies such as County, State, and federal agencies.

Prepare comparative budget sheets by program and provide detailed information to District management personnel.

Assure compliance with laws and regulations in the various accounting records, procedures and systems of internal controls to determine compliance; determine the accuracy of records of revenues and expenditures and appropriate documentation.

Prepare budget revision transfers utilizing the chart of accounts; prepare current and long-range projections of revenues, expenditures and fund balances; provide accurate reports and data.

Operate a computer and assigned software; type an input data; create budget worksheets, reports, spreadsheets and other documents as assigned.

Assist auditors and provide required information and coordinating necessary project activities; assist other personnel within the department to support them in the completion of their work activities.

Communicate with personnel, auditors, consultants and outside agencies to exchange information and resolve issues or concerns; collaborate and interface with School site Administrators and staff.

Attend meetings and in-service trainings related to assigned activities; assist in coordinating and planning District-wide workshops and trainings; train and provide guidance to Administrators and District staff.

OTHER FUNCTIONS:

Perform related duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES:

KNOWLEDGE OF:

General accounting, budget and business functions of an educational organization.
Preparation, review and control of assigned budgets and accounts.
Preparation of financial statements and comprehensive budget reports.
General theory and application of budgetary planning and control in a school system.
Federal, state, and local laws, codes, and regulations related to assigned financial record keeping and control activities.
Financial and statistical record-keeping techniques.
Standard Account Code structures (SACS).
Methods, procedures and terminology used in technical accounting work.
Financial analysis and projection techniques.
Data control procedures and data entry operations.
Oral and written communication skills.
Interpersonal skills using tact, patience and courtesy.
Modern office practices, procedures and equipment.
Arithmetic computations.

ABILITY TO:

Perform a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets.
Evaluate and project annual income and expenditures to determine budget requirements.
Maintain accurate financial and statistical records.
Compile, analyze and record financial and statistical data.
Prepare reports, forecasts, projections and recommendations.
Verify, balance and adjust budgets and accounts.
Review, process, evaluate and verify a variety of budgetary and financial information.
Operation of a variety of office equipment and machines including a computer assigned software and spreadsheet applications.
Assure compliance with applicable District policies, procedures and governmental regulations.
Interpret and apply rules, regulations, policies and procedures.
Identify, investigate and resolve financial errors and discrepancies.
Assemble, organize and prepare data for records and reports.
Reconcile, balance and audit assigned budgets, statements and accounts.
Interpret, apply and explain rules, regulations, policies and procedures.
Compare numbers and detect errors efficiently.
Communicate effectively both orally and in writing.
Establish and maintain cooperative and effective working relationships with others.
Work independently with little direction.
Meet schedules and time lines.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: associate's degree in business administration, accounting, or related field and three years increasingly responsible experience in professional accounting working with budget development and evaluation. Some experience in a school or governmental setting desirable.

WORKING CONDITIONS:

ENVIRONMENT:
Office environment.

PHYSICAL DEMANDS:
Dexterity of hands and fingers to operate a computer keyboard.
Seeing to read a variety of materials.
Hearing and speaking to exchange information.
Sitting for extended periods of time.
Generally the job requires 80% sitting, 10% walking, and 10% standing.

FLSA Status: Non-Exempt
Approval Date: April 17, 2008
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Salary Range: Classified 44 (Approved 10/10/17)