

**SACRAMENTO CITY UNIFIED SCHOOL DISTRICT  
Position Description**

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<b>TITLE:</b>	Budget Analyst	<b>CLASSIFICATION:</b>	Classified Confidential
<b>SERIES:</b>	None	<b>FLSA:</b>	Exempt
<b>JOB CLASS CODE:</b>	8057	<b>WORK YEAR:</b>	12 Months
<b>DEPARTMENT:</b>	Fiscal Services	<b>SALARY:</b>	Range 63 Salary Schedule F
<b>REPORTS TO:</b>	Director, Fiscal Services	<b>BOARD APPROVAL:</b>	12-17-01
		<b>BOARD REVISION:</b>	07-30-09

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**BASIC FUNCTION:**

Coordinate and perform complex, advanced-level accounting and budgeting duties requiring independent judgment and analysis related to district financial records and reports. Prepare various related reports as required internally, and by local, state, and/or federal sources, and local oversight committee(s). Serve as fiscal operations specialist in assigned areas; provide supervision and work direction to others.

**REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below [E]. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principle job elements.)**

Coordinate and perform complex, advanced-level accounting and budget duties requiring independent judgment and analysis; maintain various financial records, ensure all related accounting entries and transfers are completed, and accounting records reconcile to respective reports. **E**

Assure compliance with various local, state, and/or federal reporting requirements, guidelines, rules, and regulations, as well as district procedures and policies; serve as fiscal operations specialist in assigned areas; provide supervision and work direction to others. **E**

Analyze complex, advanced-level technical accounting procedures; review and maintain records; and prepare reports including graphic displays. **E**

Analyze advanced-level processes and procedures, and implement appropriate accounting systems. **E**

Monitor assigned budgets to assure compliance, identify and rectify discrepancies, respond to questions, and provide detailed instructions. **E**

Research and compile advanced-level statistical and other data, and work on special projects related to collective bargaining. **E**

Provide analysis for budget development including salary projections; act as a point person for salary analysis per site and department requests; assist with year-end closing of district accounts and procedures. **E**

Provide assistance/analysis and interface with sites regarding budgeting; analyze revenues and expenditures to ensure proper balancing within resources; streamline budget procedures; assist with special projects. **E**

Assist with charter school budgeting, billing, and oversight; responsible for assigned funding sources and reports for consolidated applications. **E**

Coordinate, create, and manage databases to provide accurate and timely statistics and other data; coordinate and perform research; supervise information gathering. **E**

Prepare and store documents using standard office equipment and technology including computers, scanners, copiers, and electronic storage devices; operate a computer to input, output, update, and access a variety of records and information; generate reports, records, lists, and summaries from computer database. **E**

Prepare extensive, frequent, detailed, and accurate bargaining unit reports; assemble confidential and sensitive information related to labor relations and negotiations; assist management in the preparation of proposals for collective bargaining. **E**

Provide excellent customer service by establishing positive relationships with district personnel, representatives from external organizations and others; respond to phone calls, e-mails, letters, and other communications; lift light objects. **E**

Promote teamwork by sharing knowledge, cooperating with others, participating in meetings and work groups, and supporting the goals and objectives of the district and division. **E**

Perform related duties as assigned.

### **TRAINING, EDUCATION, AND EXPERIENCE:**

Any combination equivalent to: bachelor's degree with a major in accounting or related field, and six years increasingly responsible experience in accounting, construction accounting, auditing, financial, or statistical record-keeping.

### **LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license; provide personal automobile and proof of insurance. Overall scores in computer software testing program preferred as follows:

Keyboarding.....	60 Correct WPM
Word.....	95% Overall Score
Excel / Access .....	95% Overall Score
General Accounting.....	95% Overall Score

### **KNOWLEDGE AND ABILITIES:**

#### **KNOWLEDGE OF:**

Government accounting principles and report submission.  
 California school district fiscal and budget procedures, and reporting requirements.  
 Preparation of financial reports and schedules.  
 Local, state, and federal reporting and accounting guidelines, rules, and regulations.  
 Technical aspects of field of specialty.  
 Applicable sections of the State Education Code, other laws, rules, and regulations related to assigned activities.  
 District organization, operations, policies, and procedures.  
 Bargaining unit reports, labor relations, and negotiations.  
 Operation of a computer, related software, and standard office equipment.  
 Paperless electronic filing systems.  
 Research methods, and report writing and recordkeeping techniques.  
 Correct oral and written usage of English, grammar, spelling, punctuation, vocabulary, and composition.  
 Interpersonal skills using tact, patience, and courtesy.  
 Health and safety regulations.

#### **ABILITY TO:**

Perform the basic function of the position.  
 Analyze and interpret complex fiscal records and documents.  
 Prepare extensive, frequent, detailed, and accurate bargaining unit reports, and assemble confidential and sensitive information related to labor relations and negotiations.  
 Operate a computer, related software, and standard office equipment.

Research, analyze, compile, and verify data, and prepare accurate and complete financial reports.  
 Read, interpret, apply, and explain rules, regulations, policies, and procedures.  
 Handle multiple tasks, work under pressure, and work with priorities/deadlines subject to frequent change.  
 Exercise analytical and independent judgment.  
 Analyze situations accurately, and adopt an effective course of action.  
 Work confidentially with discretion, and complete work with many interruptions.  
 Communicate effectively, both orally and in writing.  
 Establish and maintain cooperative and effective working relationships with others.  
 Work in a team environment.  
 Compose correspondence and written materials independently.  
 Lift light objects according to safety regulations.  
 Meet state and district standards of professional conduct as outlined in Board Policy.

**WORKING CONDITIONS:**

**SAMPLE ENVIRONMENT:**

Office and site environment; drive a vehicle to conduct work; constant interruptions.

**SAMPLE PHYSICAL ABILITIES:**

Sit for extended periods of time; dexterity of hands and fingers to operate a computer keyboard; reach overhead, above the shoulders and horizontally, bend at the waist, and kneel or crouch to retrieve files from cabinets and shelves; hear and speak to exchange information; see to read and assure accuracy of financial and fiscal records and reports; lift light objects.

**SAMPLE HAZARDS:**

Occasional contact with dissatisfied or abusive individuals.

**NOTE:** This job class has been designated “Confidential” by the Board of Education in accordance with the Rodda Act.

*(Former Title: Fiscal Analyst III)*

**APPROVALS:**

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Carol Mignone Stephen, Associate Superintendent, Human Resource Services

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Date

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Susan E. Miller, Interim Superintendent

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Date