



PERSONNEL COMMISSION

Class Code: 0098
Salary Range: 55 (M2)

BUDGET DIRECTOR

JOB SUMMARY

Under administrative direction, direct and organize District fiscal planning and budget preparation and administration activities; develop and recommend Board policies and administrative regulations for fiscal services; manage and supervise assigned budget functions such as position control, classification of accounts and student attendance accounting; perform related duties as assigned.

EXAMPLES OF DUTIES

The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.

- Plan, assign and supervise the work of assigned staff in the Budget Branch. **E**
- Prepare financial planning guidelines and assumptions and confer with District administrators and managers during the budget development cycle to clarify projections and rationales for budget requests; plan and direct the Budget Branch staff in the budget preparation process; administer and supervise appropriation control once the budget becomes operational. **E**
- Design and supervise the account coding system (Chart of Accounts). **E**
- Supervise the position control and student attendance accounting systems. **E**
- Work with District administrators in forecasting enrollments, average daily attendance (ADA) and future financial requirements. **E**
- Advise administrators and program managers on the development, implementation, and control of program budgets. **E**
- Prepare reports or edit reports of subordinate staff for District management or the Board of Education concerning subjects such as specific program expenditures, financial status or mandated reports for local, state or federal agencies. **E**
- Approve and authorize a variety of financial transactions and budget transfers and maintain positive control of all appropriation transfers. **E**
- Review District revenues and initiate adjustments to the budget as needed. **E**
- Serve as financial resource person on District collective bargaining team. **E**
- Make presentations before groups. **E**
- Operate office equipment such as multi-line telephone, personal computer, terminal and keyboard. **E**

*Note: At the end of some of the duty statements there is an italicized **E** that identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.*

DISTINGUISHING CHARACTERISTICS

A Budget Director plans and coordinates District fiscal activities which include budget preparation and administration, position control, attendance accounting, classification of accounts, expenditure projections and revenue estimating, mandated reporting, appropriation transfers and advising District administrators on the development and administration of site budgets. An incumbent directs and supervises a professional and paraprofessional staff.

EMPLOYMENT STANDARDS

Knowledge of:

Budget control and revenue projections including student attendance accounting.

Fiscal and budgeting principles and practices.

Generally accepted accounting principles, practices and procedures and related regulations.

Financial analysis and projection techniques, and financial reporting procedures.

Collective bargaining agreements and related fiscal impacts.

The application of electronic data processing to financial transactions including on-line applications.

Organization, work management and personnel supervision.

Applicable sections of the Education Code and state financial management regulations.

Modern office practices and procedures.

Ability to:

Manage and direct assigned functions relating to fiscal control and analysis.

Design and implement complex account coding systems.

Conduct studies, analyze complex statistical and financial data and prepare clear, concise oral and written reports.

Develop, control and monitor budgets and accounts.

Maintain or direct the maintenance of financial and statistical records.

Analyze situations accurately and adopt an effective course of action.

Operate a personal computer including keyboard and a financial management system.

Meet schedules and timelines.

Operate office equipment such as personal computer, keyboard and multi-line telephone.

Make presentations before groups.

Establish and maintain effective relationships with others.

Education and Training:

Graduation from an accredited college or university with a degree in accounting, financial management, business administration or a closely related field.

Experience:

At least five years of varied and responsible administrative and financial experience, preferably in a public agency, which includes complex accounting and budgeting systems and preparing reports. Two years must have been in an advisory, regulatory, supervisory or managerial position. Such experience should be in an organization with an annual budget approximating \$100 million.

Any other combination of training and/or experience, which demonstrates that the applicant is likely to possess the required skills, knowledges and abilities, may be considered.

WORKING ENVIRONMENT

Office environment.

PHYSICAL DEMANDS

Dexterity of hands and fingers to operate office equipment.

Sitting for extended periods of time.

Seeing to review and analyze financial or other records and reports.

Hearing and speaking to exchange information in person or telephonically.

AMERICANS WITH DISABILITIES ACT

Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

APPOINTMENT

In accordance with Education Code Section 45301, an employee appointed to this class must serve a probationary period of one (1) year during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.

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