



PERSONNEL COMMISSION

Class Code: 0765
Salary Range: 46 (M2)

PRINCIPAL BUDGET ADVISOR/ANALYST

JOB SUMMARY

Under general direction, participate in the planning and organizing of district budget development and administration; direct and supervise assigned personnel in the performance of ongoing budget functions; conduct complex financial analyses and prepare financial reports; 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 and direct the Budget Branch staff in the budget preparation process; administer and supervise appropriations once the budget becomes operational. **E**
- Develop and monitor financial management systems and procedures required for revenue and expenditure revision, position control and attendance accounting. **E**
- Prepare intermediate and long-range projections of revenues and appropriations for executive management. **E**
- Conduct analyses and make recommendations on identified budget problems or developments. **E**
- Review budget expenditure plans and prepare alternative recommendations to keep expenditures within planned amounts. **E**
- Analyze legislative proposals and related regulations and guidelines regarding educational funding and report the potential impact on the District. **E**
- Prepare or direct the preparation of studies and a variety of reports to State and Federal agencies. **E**
- Maintain ongoing contact with District administrators and managers to advise and assist in the management of site and program budgets. **E**
- Conduct training on features of budget preparation and administration for Budget Branch staff and District site personnel. **E**
- Make presentations before groups. **E**
- Operate office equipment such as multi-line telephone, personal computer, terminal and keyboard. **E**
- Authorize approvals of a variety of financial transactions in the absence of the Director. **E**

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

DISTINGUISHING CHARACTERISTICS

A Principal Budget Advisor/Analyst performs and directs Budget Branch staff in the performance of developing, implementing, revising and controlling the District budget and, in the absence of the Director, authorizes the approval of a variety of financial and budget transactions. An incumbent also assists and participates in other management decision-making and advising responsibilities. An incumbent performs the more complex duties of comprehensive financial planning and administration for the District budget.

EMPLOYMENT STANDARDS

Knowledge of:

Budget control and revenue projections.

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.

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

Principles of supervision and training.

Organization and work flow management.

Modern office practices and procedures.

Ability to:

Prepare, revise, implement and control complex budget components and processes.

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

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.

Train and motivate staff.

Operate computerized financial management systems.

Meet schedules and timelines.

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

Make presentations before groups.

Establish and maintain effective working relationships with others.

Education and Training:

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

Experience:

At least three years of financial planning/administration experience, preferably in a public agency, requiring the preparation and analysis of financial plans. Such experience should be in an organization with an annual budget approximating \$75 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.
Occasional travel to sites or professional meetings.

PHYSICAL DEMANDS

Dexterity of hands and fingers to operate office equipment.
Sitting for extended periods of time.
Seeing to review and analyze financial records and reports.
Hearing and speaking to exchange information related to the budget function 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.