



**CLASSIFIED**  
**Job Class Description**

Equal Employment  
Opportunity

**BUDGET ANALYST**

**DEPARTMENT/SITE: BUSINESS SERVICES**

**SALARY SCHEDULE:** Classified Salary Schedule  
(Group 1/Group 15)

**LEVEL:** Range 68

**WORK YEAR:** 12 Months

**REPORTS TO: ASSISTANT SUPERINTENDENT,  
BUSINESS SERVICES**

**DATE CURRENT JOB DESCRIPTION APPROVED:**  
Board of Education effective: ....August 12, 2021

**JOB GOAL/PURPOSE:**

Under the supervision and direction of the Assistant Superintendent, Business Services, to ensure the preparation and ongoing maintenance, control and integrity of the District's budgeting and financial systems; to ensure the timely receipt of funds and their correct allocation to financial system accounts; to prepare regular and special financial reports that support management's planning and decision-making. The incumbents in this classification provide the school community with accurate and timely budget and financial information essential to ensure funding for District's strategic goals and day-to-day operations which directly supports student learning.

**DISTINGUISHING CHARACTERISTICS**

The Budget Analyst is an advanced-level technical and specialized classification that performs responsible and highly complex functions to assist the Assistant Superintendent, Business Services to establish and maintain the District's financial systems including budget development and control for general and other funds. This position works with considerable independence and has overall responsibility for the soundness and reliability of the technical aspects of the budgeting and financial control systems and through presentation of training programs and oversight roles for ensuring adherence to District and other applicable financial standards as well as for relating the financial system to other key systems such as payroll and personnel.

**ESSENTIAL FUNCTIONS, TASKS AND DUTIES:**

- Prepare, analyze, and maintain District budgets and answer site and department questions.
- Administer various capital facility funds, community facilities districts, certificates of compliance and participation and San Diego County Treasury portal wire transfers to ensure accuracy and availability for authorized use and conformance to applicable statutes.
- Monitor and keep records of developer fees and Mello Roos taxes and prepare accounts for reporting information on activities and costs associated with facilities and construction finances.
- Develop and monitor general and categorical fund budget activities as well as other funds within the District's accounting system.
- Reconcile other District bank accounts and other related work as required.
- Monitor bond activities, Mello-Roos and developer fees and other funding sources to ensure timely and accurate reporting and appropriate support actions.
- Prepare State and Federal reports independently including but not limited to the CAT SACS form,

financial section of the Consolidated Application, quarterly/semiannual grant/entitlement reports and site allocation reports.

- Coordinate annual year-end closing and audits.
- Perform tasks required to maintain complex accounting, budget and fiscally related records and reports.
- Prepare, organize and conduct research and compile data to complete complex reports.
- May be responsible for the desk duties of other accounting personnel upon cross-training.
- Travel to various district sites to assist with development of site budgets.
- Attend trainings at various locations away from the Solana Beach School District.
- Perform other functions, duties and tasks related to this class as assigned.

### **JOB QUALIFICATIONS /REQUIREMENTS:**

*(At time of application.)*

#### **Knowledge of:**

- Principles and practices, methods and terminology used in school district accounting and budgeting, construction financing and real estate transactions
- State codes and regulations related to budget monitoring, fund accounting, school construction financing, real estate transactions; school district organization, operations, policies and objectives
- Methods, practices and terminology used in fund accounting and complex financial record keeping
- Correct English usage, including grammar, spelling, punctuation and vocabulary
- Computer software, including Microsoft Word, Excel and FileMaker Pro
- Telephone techniques and etiquette
- Interpersonal skills, including use of tact, patience, confidentiality, and courtesy

#### **Skills:**

- Proficient with Oracle/Peoplesoft HCM/financial software
- Keyboarding accurately at an acceptable rate of speed
- Use 10-key calculator accurately at an acceptable rate of speed
- Operate standard office equipment including use of District-issued computer and District-adopted computer applications and systems (currently includes Microsoft Excel, Word, email, Peoplesoft HCM/Financial Software, Safari/Firefox, etc.)
- Use correct spelling, grammar and punctuation
- Perform basic arithmetic calculations quickly and accurately
- Organize, prioritize and multi-task work assignment and deadlines within short timelines and high volume

#### **Ability to:**

- Prepare, analyze, plan, organize and maintain, District budgets and complex, technical records for accounting, budgeting and reporting various district general, special and facility financing sources
- Perform highly skilled budget, accounting and financial record keeping independently and effectively
- Perform computation tasks with accuracy and speed
- Work efficiently under pressure with constant interruptions
- Be well organized and detail oriented
- Carry out oral and written instructions
- Establish and maintain effective working relationships with others

### **EDUCATION REQUIRED:**

Bachelor's Degree in Accounting, Finance, Business or closely related field.

**EXPERIENCE REQUIRED:**

Minimum of three (3) years of responsible administrative, fiscal support experience including researching and analyzing information and coordinating projects independently and working with automated record keeping, accounting, budgeting and word processing systems. Experience and training may include completion of advanced course work, workshops, seminars and training sessions in school district business services areas, public administration, accounting, budget or related fields.

**LICENSE(S) REQUIRED:**

- Possession of a valid California driver's license and remain insurable at the District's standard insurance market rate. Current DMV report.

**CERTIFICATIONS AND TESTING REQUIRED:**

- Pass the District's applicable proficiency exam (e.g., written test, oral interview and/or work sample) for the job class with a satisfactory score.
- After offer of employment, obtain:
  - Criminal Justice and FBI Fingerprint Clearance
  - Negative pre-employment drug screen test at District's expense
  - Pre-employment physical exam at District's expense
  - Negative TB test result plus periodic post-employment retest as required (currently every four years)

**WORK ENVIRONMENT/PHYSICAL DEMANDS:**

*(Must be performed with or without reasonable accommodations)*

- Work is primarily indoors in an office environment and requires sitting for extended periods
- Dexterity of hands and fingers to operate a computer keyboard and other office equipment and maintain paper files and documents
- Lifts objects such as boxes containing documents and weighing up to 35 pounds
- Kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies
- Hearing and speaking to exchange information in person or on the telephone
- Visual acuity to see/read documents and computer screen
- Incumbents may be exposed to intermittent noise and frequent interruptions
- Occasional operation of a vehicle to travel within and outside the district for meetings, training sessions and assisting staff at school sites