

LODI UNIFIED SCHOOL DISTRICT

CLASS TITLE: SENIOR BUDGET ANALYST

BASIC FUNCTION:

Under the direction of the Director of Budgets, this position is responsible for advanced financial and budget management and analysis and data integration responsibilities; assisting in the preparation of financial and budget reports required by the state, the Board of Education, and management; assisting in the preparation of the district budget and monitoring expenditures.

REPRESENTATIVE DUTIES:

Perform specialized and complex professional work in the development, control, and analysis of assigned District budgets; Ensure compliance with guidelines, rules, regulations, and procedures affecting budgetary actions.

Prepare, upload, and integrate financial data into district systems from multiple platforms, including QSS and other vendor systems.

Ensure data integrity and accuracy across all financial and budget management platforms.

Monitors budget controls for all programs and district-wide budgets.

Serves as a lead control point for position control purposes.

Assist in the preparation of the district budget, providing estimates of income and expenditures.

Train and provide work direction to assigned staff; provide technical assistance, coordinate, and monitor budget and timelines; provide in-service training for school and office personnel in accounting and budget procedures.

Assist and review the district's requisition procurement process.

Assist the Director of Budgets in preparing future projection models related to negotiations, staffing projections, and allocations for school sites using Unrestricted and Restricted funding sources.

Assist in conducting budget research and developing reports for management and the Board of Education.

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Principles and practices of accounting, auditing, and budgeting. General accounting, budget, and business functions of a school district. California State Accounting Manual.

Database methodologies and processes.

Operation of computer equipment and use of spreadsheet, word processing, and accounting-related software.

Preparation of financial statements and comprehensive accounting reports.

Generally accepted accounting and auditing principles, practices, and procedures.

Procedures and practices required in research, data collection, statistical computation, and reports. Laws, rules, and regulations related to assigned activities including applicable sections of the Education Code. District organization. operations, policies, rules, and objectives. Principles of training and providing work direction.

ABILITY TO:

Perform responsible, professional accounting work involved in the analysis and examination of District fiscal materials.

Read, interpret, apply, and explain rules, regulations, policies, and procedures pertaining to school accounting operations and budget procedures.

Maintain current knowledge of program rules, regulations, requirements, and restrictions. Learn coding financial data for computer entry.

Apply generally accepted accounting principles and procedures. Examine, verify, and prepare financial documents and reports.

Operate computer terminal, calculating machines, ten-key adding machines, and typewriter with speed and accuracy.

Create spreadsheets for the computation of data.

Communicate effectively both orally and in writing.

Analyze data, draw logical conclusions, and prepare comprehensive reports. Compile and verify data and prepare reports.

Establish and maintain cooperative and effective working relationships with others.

Train and provide work direction to others.

EDUCATION AND EXPERIENCE:

Any combination equivalent: bachelor's degree in business, accounting, economics, finance, or a related field and 4 years of experience in technical, governmental budget work equivalent to a budget analyst or higher, preferably in a California school district.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

PHYSICAL DEMANDS:

Sitting at a keyboard to enter data into a computer terminal for extended periods of time.

Dexterity of hands and fingers to operate a computer keyboard.

Bending at the waist, kneeling and crouching

Lifting light objects to 25 pounds

Board Approved: TBD