

LA MESA-SPRING VALLEY SCHOOLS

CLASS TITLE: BUSINESS SERVICES AND BUDGET ANALYST

BASIC FUNCTION:

Under the direction of the Director, Fiscal Services, performs a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets; evaluates and projects annual income and expenditures to determine budget requirements; researches, compiles financial data; prepares, maintains and assures accuracy of related budgetary and financial records and reports.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Assists in preparation, analysis, alignment and development of District budget; aligns assigned budgets to keep remaining balances positive; analyzes changes in the budget; reviews budgets to adjust for staffing changes, step increases and other changes.

Communicates with personnel and outside agencies to exchange information and resolve issues or concerns.

Compiles and evaluates a variety fiscal information related to assigned fiscal functions, enrollment and attendance; assembles and distributes related materials; ensures mandated reports are submitted to appropriate agencies according to established timelines.

Coordinates placement of students at alternate schools for overflow when space is not available for the purpose of complying with state and bargaining unit class-size issues.

Develops annual enrollment projections for the purpose of estimating staffing and facility needs for the upcoming year; monitors class size on an on-going basis; estimates the impact on school capacity, current and future facility needs; recommends possible changes in staffing levels, class reorganizations, enrollment limits and inter and intra-District transfers.

Evaluates and project annual income and expenditures to determine budget requirements; analyze budgetary data and provide administrators with recommendations concerning budget development, projections and administration.

Maintains facility lease agreements with various agencies for sites throughout the District.

Maintains, audits and reconciles assigned budgets; assembles, matches, sorts, tabulates, checks and posts a variety of financial and statistical data including income and expenditures; reviews, adjusts and assures accuracy of journal entries; balances and adjusts accounts.

Monitors financial activity of assigned accounts; monitors expenditures and revenue; posts expenditures to appropriate account; adjusts accounts as appropriate; compare expenditures with financial records to verify and assure accuracy.

Operates a variety of office equipment including a calculator, copier, computer and assigned software.

Performs a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets; ensures compliance with established budgetary guidelines, rules, regulations, policies and procedures.

Prepares and projects salary and benefits costs; assists District management in preparing and managing their budgets.

Processes and evaluates various forms and applications as assigned; compares and reconciles forms, statements, records, reports and other financial documents; identifies errors and resolve discrepancies; collects developer fees; initiates account transfers as needed.

Researches, compiles, prepares and revises financial data related to assigned budgets, accounts and activities; prepares and maintains a variety of auditable financial records, reports and files related to budgets, accounts, income, expenditures and assigned activities.

Reviews and evaluates budget proposals and provide technical consultation concerning short and long-term impact of proposal specifications.

Serves as a technical resource to personnel, outside agencies and others concerning assigned budgets; respond to inquiries and provides technical information concerning related accounts, salary and benefits cost projections, funds, transactions, records, standards, laws, regulations, policies and procedures.

Type and inputs a variety of budgetary and other financial data into an assigned computer system; maintain various automated records and files; initiates queries, manipulates data, develops spreadsheets and generates a variety of computerized reports and statements; assists in the preparation of Board reports relating to Business Services; assures accuracy of input and output data.

OTHER DUTIES:

Attends and participates in meeting, in-service trainings, workshops and conferences.

Performs related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

General accounting, budget and business functions of an educational organization.
Preparation, review and control of assigned budgets and accounts.
Preparation of financial statements and comprehensive budget reports.
General theory and application of budgetary planning and control in a school system.
Financial and statistical record-keeping techniques.
Methods, procedures and terminology used in technical accounting work.
Applicable laws, codes, regulations, policies and procedures.
Financial analysis and projection techniques.
Data control procedures and data entry operations.
Oral and written communication skills.
Interpersonal skills using tact, patience and courtesy.
Modern office practices, procedures and equipment.
Arithmetic computations.

ABILITY TO:

Perform a variety of specialized accounting duties to assist in the preparation, analysis and maintenance of designated budgets.
Evaluate and project annual income and expenditures to determine budget requirements.
Maintain accurate financial and statistical records.
Analyze financial data and prepare reports, forecasts and recommendations.
Verify, balance and adjust budgets and accounts.
Review, process, evaluate and verify a variety of budgetary and financial information.
Identify, investigate and resolve financial errors and discrepancies.
Assemble, organize and prepare data for records and reports.
Reconcile, balance and audit assigned budgets and accounts.
Interpret, apply and explain rules, regulations, policies and procedures.
Compare numbers and detect errors efficiently.
Communicate effectively both orally and in writing.
Establish and maintain cooperative and effective working relationships with others.
Work independently with little direction.
Meet schedules and timelines.
Operate a computer and assigned software.
Perform arithmetic calculations quickly and accurately.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: bachelor's degree in accounting or related field and three years accounting experience including work with budget development and evaluation.

LICENSES AND OTHER REQUIREMENTS:

Successful passage of the District's job-related proficiency test.

WORKING CONDITIONS:

ENVIRONMENT:

Indoor office environment.

PHYSICAL DEMANDS:

Dexterity of hands and fingers to operate a computer keyboard.
Hearing and speaking to exchange information.
Sitting or standing for extended periods of time.
Seeing to read a variety of materials.
Bending at the waist, kneeling or crouching to file materials.

FLSA Status

Non Exempt

Approval Date

03/01/08 (Business Services Analyst), 9/28/17