

BUDGET MANAGER

DEFINITION

Under administrative direction, plans, organizes, manages and supervises assigned functions as they relate to the preparation and monitoring of the District's annual budget; prepares, analyzes and evaluates complex fiscal reports, maintains communications with state, county and district administrators and special committees; provides analytical functions and assistance relative to financial legislation; prepares reports for various agencies; and performs other related duties as required.

DISTINGUISHING CHARACTERISTICS

This position is characterized by its requirement to perform complex accounting and analytical functions with a high degree of accuracy; to work independently to plan, organize, analyze, and make recommendations; to interpret District, County, State, and Federal laws as they relate to the District's business; to work with all levels of management.

OCCUPATIONAL GROUP

Classified (Management)

EXAMPLES OF DUTIES

Duties may include, but are not limited to, the following:

1. Develops, updates and monitors the projection of general purpose revenues including the revenue limit. **(E)**
2. Prepares or directs staff to prepare documentation to support claims for reimbursement for transportation costs, special education, mandated costs claims, adult education, and all other categorical programs operated by the District. **(E)**
3. Collects and reviews data and prepares the annual budget. **(E)**
4. Prepares and distributes budget input forms to school sites and departments. **(E)**
5. Monitors the budget, supervises all necessary transfers. **(E)**
6. Prepares and conducts in-service training to departments and school site personnel on budget preparation and monitoring. **(E)**
7. Supervises and coordinates the work of support staff in collecting, calculating, verifying and posting budgeting and accounting data. **(E)**

8. Prepares fiscal analysis as needed for sound financial decisions, or as support for income claims. **(E)**
9. Manages computer-based accounting system. **(E)**
10. Assists with training of staff in procedures and methods necessary for successful completion of assigned tasks.
11. Assists with special studies and projects as they relate to the Business Services Division.
12. Assists with the review, update, formulation and implementation of policies and procedures for the Business Services Division. **(E)**
13. Coordinates ongoing review, formulation, and implementation of Business Division policies and procedures. **(E)**
14. Analyzes, monitors and makes recommendations on legislation affecting the District's finances and/or Business Division. **(E)**
15. Keeps current on changes and modifications in regulations and rulings on accounting practices, which may require adjustments and changes in District business functions. **(E)**
16. Supervises the Position Control System. **(E)**
17. Performs other related duties as assigned.

(E) = Essential Functions

MINIMUM QUALIFICATIONS**Knowledge of:**

- Generally accepted accounting principles, practices and procedures;
- Financial and statistical record keeping;
- Preparation of comprehensive financial reports;
- Applicable sections of the California Education Code and State financial management regulations;
- Organizational planning, problem solving, work management, conflict management and personnel supervision and evaluation;
- Maintenance of financial and statistical records;
- The application of electronic data processing to financial transactions including on-line applications;
- Office equipment (i.e., computers, keyboard);
- Modern office practice and procedures;

- School district budget preparation;
- Federal, State and local reporting requirements;
- Expenditure control, Position Control Systems, computer-based accounting systems, spreadsheets, and word processing software.

Ability to:

- Plan, organize, and supervise financial and statistical record keeping activities;
- Analyze situations accurately and adopt an effective course of action;
- Meet timelines;
- Perform complex accounting work;
- Interpret, explain, and apply rules, regulations, and District policies to employees and others;
- Operate a personal computer and a financial computing system;
- Make presentations before groups;
- Establish and maintain effective working relationships with other employees of the District, vendors, and other public agencies as appropriate;
- Train and supervise professional, paraprofessional and clerical staff;
- Read and understand financial and technical materials;
- Follow oral and written instructions;
- Work with all levels of management;
- Research and evaluate data;
- Operate standard office machines (i.e., microcomputer, calculator).

EXPERIENCE

At least three years of professional or accounting experience, preferably in a public agency, in the operation of accounting systems and preparation of management reports. Experience should be in an organization with an annual budget of approximately \$100 million.

EDUCATION

Graduation from an accredited four year college or university with a Bachelor's Degree in Accounting, Business Administration, or a closely related field desirable, depending upon background, training, and experience.

WORKING CONDITIONS

- District Office environment with occasional visits to school sites.

PHYSICAL ABILITIES

- 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 and on the telephone.

HAZARDS

- Extended viewing of computer monitor.

SPECIAL REQUIREMENTS

Must possess or obtain prior to appointment, a valid California Vehicle Operator's License. Must have the ability to obtain and maintain insurability status under the District's Vehicle Insurance policy.

Approved: 06/05/97
Revised: 02/03/05