



Cañada College ♦ College of San Mateo ♦ Skyline College

GENERIC POSITION DESCRIPTION

DISTRICT BUDGET OFFICER

A Classified Supervisory Position (Exempt)
Grade 196E – Salary Schedule 35

A. General Statement

The District Budget Officer performs professional work involving budget development, budget revisions, budget reports, position control, and cost analysis. Reporting to the Chief Financial Officer, the District Budget Officer conducts budgetary research/analysis projects and coordinates of a wide variety of complex analytical projects and assignments for a central District service area. Under direction, the employee researches, evaluates, analyzes, formats data, plans and coordinates processes, and makes recommendations for the initiation, modification and implementation of a variety of District and centralized services. A high degree of independent judgment and creativity are required to select and analyze data in order to draw conclusions, make original recommendations, write reports and to resolve a variety of minor and potentially major problems that occur. Consequences of errors in judgment can be costly in employee time, public relations and/or institution funding; however, administrative controls limit the risk of serious consequences.

B. Duties & Responsibilities

The duties below are representative of the duties of the classification and are not intended to cover all of the duties performed by the incumbent(s) of any particular position. The omission of specific statements of duties does not exclude them from the position if the scope of work is similar, related, or a logical assignment to this classification.

1. Exchanges information with staff at all levels, outside agencies and institutions, and the general public, pertaining to State and District funding and the budgeting process
2. Monitors changes in State funding formulas and regulations and applicable effects upon the District's budget; applies principles of Education Code and State budget and accounting policies to District budget process and procedures
3. Coordinates the development of the District budget, overseeing the technical implementation of the budget process
4. assists in the development, maintenance and analysis of the allocation formula or other calculations utilized in the allocation of funds within the District
5. Makes changes, as approved by the Board of Trustees, to the position control system, including position classifications, positions, labor distribution codes, etc.
6. Prepares State reports, such as the Full-Time Faculty Obligation Report, etc.
7. Makes recommendations for improved procedures for budget development, control, analysis, and allocation of resources
8. Prepares, maintains, provides explanation of the District's budget for quarterly and annual budget reports for the Board of Trustees and outside organizations

9. Coordinates with other staff to maintain, analyze and revise position control records and benefit rate tables to assure accurate personnel costs and budgeting
10. Uses a variety of spreadsheet and other data access tools to analyze complex statistical, financial and other data in order to research, analyze and prepare budget and financial data related to budget status analyze budget information and prepare a variety of reports
11. Identifies and analyzes significant budget to actual variances
12. Maintains historical and current materials related to the District's budget as well as the funding and allocation formulas, expenditure patterns, and special cost analysis of such things as agency compliance regulations, collective bargaining and grievance issues, legal decisions, and funding resources
13. Assists with financial management of various District set-aside programs (i.e. unit banking, staff development, professional development, apprenticeship programs) during the year and year-end closing
14. Coordinates financial processes, such as electronic approvals of budget and expenditure journals, system security, creation of various journal types and detail codes, and maintenance of the chart of accounts
15. Assists with coordinating year-end fiscal close activities in conjunction with budget development activities
16. Provides technical expertise and advice to management and administrators regarding budget and fiscal matters to assure that accounting procedures meet fiscal accountability requirements
17. Trains, supervises and evaluates the work of paraprofessional and clerical staff
18. Schedules, coordinates and monitors the work of other staff as assigned
19. Performs other related duties as assigned

C. Requirements

1. Bachelor's degree in accounting, business administration, finance or a closely related field
2. Successful work experience of increasing responsibility that has included budgeting, accounting, planning, complex research methodologies, and data collection
3. Experience in the coordination of workloads with people at various levels within an organization
4. Skill in complex data research, analysis and reporting
5. Skill in the use of spreadsheets and a variety of computer software to compose and prepare data analysis, reports, summaries, correspondence and other materials
6. Extensive public contact with people at various levels within an organization who are diverse in their cultures, language groups and abilities
7. Demonstrated skills in written and oral communication, including public speaking
8. Skill in training, directing, supervising, and evaluating the work of others
9. Skill in project planning, implementation and evaluation

OR

An equivalent combination of education and experience

D. Physical/Other Requirements

This classification requires multi-level tasking and strategic planning, attention to detail and organization of data; conceptualization, visual comparison, complex data analysis for creation of conclusions; listening, individual to large-group communication; good memory, tact, patience, and flexibility are required in order to perform the essential functions.

E. Knowledge, Skills & Abilities

1. Knowledge of generally accepted accounting principles, practices and methods, including knowledge of governmental accounting
2. Knowledge of governmental accounting and budgeting principles, techniques, and practices
3. Knowledge of fund accounting, budgeting, and auditing practices and principles
4. Skill in the development and use of a variety of spreadsheet and other software instruments to conduct research and report findings

5. Skill in oral communication, including public speaking
6. Skill in written communication
7. Skill in communicating effectively with people at various levels within an organization
8. Skill in communicating respectfully, sensitively and effectively with people who are diverse in their cultures, language groups and abilities
9. Skill in training, directing, supervising, and evaluating the work of others
10. Skill in planning, organizing, and prioritizing a variety of workloads and deadlines
11. Ability to multi-task and organize complex, multi-faceted workloads, with attention to detail and timelines
12. Ability to analyze fiscal problems and to develop recommendations for their solution
13. Ability to maintain effective working relationships with staff
14. Ability to apply legal and technical financial manuals and State code regulations

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