



CLASSIFIED
Job Classification Description
Equal Employment Opportunity

MADERA UNIFIED SCHOOL DISTRICT
PERSONNEL COMMISSION
APPROVED MOTION NO. 22-2022/23
DOCUMENT NO. 10-2022/23
DATED 10/19/2022

LEAD BUDGET ACCOUNTING ANALYST

DEPARTMENT/SITE: Fiscal Services

SALARY SCHEDULE: Classified Confidential

SALARY RANGE: 10

WORK CALENDAR: 261 Days

REPORTS TO: Chief Financial Officer

FLSA: Non-Exempt

PURPOSE STATEMENT:

Under the general direction of the Chief Financial Officer, the Lead Budget Accounting Analyst leads and oversees others in the formulation, analysis and execution of the annual District budget; identifies budget variances and recommends appropriate actions to comply with fiscal requirements and budget guidelines; analyzes costs of programs and services; and provides analytical information, as required by administrative and program personnel and/or regulatory agencies, and provides confidential information to administrators to assist in the collective bargaining process. The incumbents in this classification provide the school community with accurate and up-to-date budget and fiscal information, which directly supports student learning and achievement.

DISTINGUISHING CHARACTERISTICS

This position is responsible for providing leadership in forming and executing the annual budget. This is a part of the Confidential, non-represented employee group. This class differs from the lower-level Budget Accounting Analyst which is part of the classified bargaining unit and provides assistance in the formulation, analysis and execution of the assigned budgets and financial reports, identifying budget variances and analyzing and recommending appropriate actions.

ESSENTIAL FUNCTIONS, DUTIES AND TASKS:

The following alphabetical list of functions, duties and tasks is typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform other closely related or department-specific functions, duties and tasks from those set forth below to address business needs and changing business practices.

- Advises administrative staff and school officials of the implications of funding alternatives, proposed program adjustments, and revenue options to provide assistance to all levels of management in the resolution of budget variances and other financial issues.
- Analyzes financial information related to services (e.g., budget reports, financial reports, expenditures, variances, projections) to identify budget variances, compile statistical information, identify long-term budgetary goals, and/or conform to established guidelines.
- Assists auditors by providing supporting documentation and/or information as needed.
- Assists staff with technical budgeting issues to provide support in preparing the information and data required for developing budgets, controlling expenditures and/or preparing budget revisions.
- Calculates cost allocations and projections for a variety of supplies, textbooks, postage, personnel, etc. to determine the financial resources sufficient for enrollment levels.
- Compiles statistical and budget data to develop budget recommendations provide summaries; and/or ensure compliance with established regulatory guidelines.
- Develops special and regular financial reports to summarize budget and financial data for management and school official use in their decision-making processes.
- Maintains a variety of confidential and non-confidential manual and electronic files, documents and

records (e.g., account structure, current and historical budget data, financial records) to provide up-to-date reference and audit trail.

- Monitors and controls the District budget (e.g., corrects negative accounts, reviews budget transfers) to correct problems in a timely manner and provide accurate reports and/or conduct current and multiyear projections.
- Oversees the preparation of budget transfers, amendments, files, etc. to ensure accuracy of data for decision-making and/or comply with regulatory requirements.
- Participates in unit meetings, in-service training, workshops, etc.
- Prepares a wide variety of written materials and electronic financial and budget information (e.g., budget variance and activity reports, financial statements, state mandated reports, budget extensions, procedures, monthly Board reports) to document activities, provide reference, convey information, and comply with established financial, legal and/or administrative requirements.
- Prepares budgets, including working with grants, assisting program administrators in developing and maintaining the program budget; providing budgetary information to administration, board members and a variety of public organizations in compliance with established regulatory guidelines.
- Processes budget-related documents (e.g., journal entries, account transfers, encumbrances) to update and distribute information, authorize for action and/or comply with established accounting practices.
- Responds to inquiries of staff and administration regarding financial procedures to provide information, direction and/or referral for addressing inquiry.
- Reviews and/or audits accounting transactions processed by others to ensure accuracy in account coding, classification and/or allocation.
- Serves as a lead in the Business Office to provide leadership, guidance and technical assistance to the budget development process.
- Performs other related duties as assigned for ensuring the efficient and effective functioning of the work unit and the District, including various mandatory district trainings.

KNOWLEDGE, SKILLS AND ABILITIES

(At time of application)

Knowledge of:

- Government Accounting Standards Board (GASB)
- Generally accepted accounting/bookkeeping principles (GAAP)
- Financial analyses and/or budget analyses
- Advanced math
- English usage, grammar, punctuation, and spelling
- Accounting related software, including advanced knowledge of spreadsheet applications
- Principles and objectives of budget preparation
- Principles and objectives of management evaluation and analysis
- Codes, laws, regulations, and policies related to accounting

Skills and Abilities to:

- Review and interpret highly technical information
- Perform accounting procedures and standard bookkeeping
- Prepare and maintain accurate records
- Lead and guide others
- Gather, collate, and/or classify data
- Work with a diversity of individuals and/or groups in a variety of circumstances
- Problem solve situations and data to define issues and draw conclusions
- Establish and maintain effective working relationships

- Speak persuasively to implement desired actions
- Meet deadlines and schedules, including setting and adapting to changing priorities
- Maintain confidentiality
- Work as part of a team
- Handle frequent interruptions
- Provide quality customer service

RESPONSIBILITY:

Responsibilities include: working under limited supervision using standardized practices and/or methods; leading, guiding, and/or coordinating others; and monitoring budget expenditures. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

JOB QUALIFICATIONS / REQUIREMENTS:

(At time of application and in addition to the Knowledge, Skills and Abilities listed above.)

EDUCATION REQUIRED:

High school diploma or equivalent.

EXPERIENCE REQUIRED:

Five (5) years of increasingly responsible experience in preparation of financial or statistical record keeping, or payroll and one year of recent use of spreadsheets.

Equivalency – Two (2) years of college level study in business administration, accounting, bookkeeping or related fields from an accredited college or university can be substituted for one year of experience.

LICENSE(S) REQUIRED:

- None required

CERTIFICATIONS AND TESTING REQUIRED:

- Pass the District's applicable proficiency exam for the job class with a satisfactory score
- After offer of employment, obtain:
 - Criminal Justice and FBI Fingerprint Clearance
 - Negative TB test result plus periodic post-employment retest as required (currently every four years)
 - Pre-employment physical exam A through District's provider

WORK ENVIRONMENT / PHYSICAL DEMANDS:

(Must be performed with or without reasonable accommodations)

- Work is performed in an indoor office environment and generally requires sitting for extended periods of time
- Lifting, carrying, pushing, and/or pulling equipment and boxes of light weight
- Manual dexterity to operate a computer keyboard and handle paperwork and equipment in an office
- Hearing and speaking to exchange information in person or on the telephone
- Visual acuity to see/read documents and computer screen