

SAN DIEGO UNIFIED SCHOOL DISTRICT

POSITION DESCRIPTION

TITLE:	Budget Specialist	REPORTS TO:	Assigned Supervisor
DEPARTMENT:	Budget	CLASSIFICATION:	Classified
FLSA:	Non-Exempt	SALARY GRADE:	044 OTBS
REVISED:	March 9, 2011		

BASIC FUNCTION:

Maintain, monitor, and provide budget control of funds owed by district for various grant and other externally funded programs and services; process budget documents, oversee data collection, entry, and submission of billings; prepare financial schedules, statistical and narrative reports, analysis, and summaries.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)

E = Essential Functions

Maintain, monitor, and provide budget control of grant monies and other external funds owed by district for various programs and services. **E**

Allocate funds to schools and programs, and assist with development of budgets, cost estimates, and recommendations for change. **E**

Oversee data collection, input, and submission activities for electronic processes. **E**

Review and approve personnel action requests (PARS), material requisitions, and time reporting documents for proper coding, charges, compliance with guidelines and restrictions, and verify availability of funds. **E**

Identify and investigate billing budget problems. **E**

Review computer generated reports for accuracy and completeness and make necessary corrections, additions, or deletions and notify others of discrepancies as necessary. **E**

Confer with agency representatives, all levels of district staff, and parents to obtain and provide information, interpret billing regulations, contracts, applicable legislation, policies and procedures; make recommendations for resolution of problems, and resolve information systems issues. **E**

Process journal vouchers, budget, expenditure, and encumbrance transfer requests, and input budget data. **E**

Prepare schedules to reconcile and balance control accounts. **E**

Prepare and maintain budget/financial status reports and approve adjustments and expenditures. **E**

Use computers to access the district student information system, financial data base, budget development data base, billing system data base, and other related computer systems to obtain and provide specialized information. **E**

Generate data base searches and prepare advanced and complex budget reports, financial schedules, analysis, and summaries, and others statistical and narrative reports and documents. **E**

Select, classify, and compile information and data. **E**

Initiate, organize, and maintain auditable records and files of district, public, and private agency billings and other operational records including historical data and fiscal records. **E**

Provide technical direction to professional level and clerical staff. **E**

Operate computers and perform electronic billing processes. **E**

Perform other duties reasonably related to the job class. **E**

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE:

Any combination of training, experience, and/or education equivalent to graduation from a recognized college or university with a major in accounting, finance, business administration, or other directly related field that includes fiscal or budget record keeping with an automated financial system and one year of recent budgetary or accounting experience of acceptable level and quality.

LICENSES AND OTHER REQUIREMENTS:

Possession of a valid California driver's license.

KNOWLEDGE, SKILLS AND ABILITIES:

KNOWLEDGE OF:

Budgetary and accounting principles and procedures.
Technical aspects of budgetary or accounting analyses.
Reading and writing communication skills.

ABILITY TO:

Interpret appropriate funding agency guidelines, requirements, and procedures.
Identify and resolve budget problems.
Interpret and reconcile data.
Maintain records and prepare complex reports.
Operate standard office equipment and computers and related software applications including electronic billing systems.
Coordinate and direct the work of assigned staff.
Establish and maintain effective working relationships with all levels of district staff, other agencies, and the public.

WORKING CONDITIONS:

ENVIRONMENT:

Work is typically performed in an office setting.

PHYSICAL REQUIREMENTS:

Sitting for extended periods of time; bending at the waist; reaching overhead, above the shoulders and horizontally; hearing and speaking to exchange information; seeing to read a variety of materials and provide design and layout services; dexterity of hands and fingers to operate computers and other equipment; lifting light objects.

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