

**SAN DIEGO UNIFIED SCHOOL DISTRICT**

**POSITION DESCRIPTION**

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<b>TITLE:</b>	Director, Budget Development	<b>REPORTS TO:</b>	Executive Director, Financial Planning and Development
<b>DEPARTMENT:</b>	Budget Development	<b>CLASSIFICATION:</b>	Classified Management
<b>FLSA:</b>	Exempt	<b>SALARY GRADE:</b>	038
<b>REVISED:</b>	April 29, 2014		

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**BASIC FUNCTION:**

Plan, organize, control and direct the functions of the Budget Development Department; administer the budget process; administer district appropriations and expenditures for district funds, programs, and organizations; direct the maintenance of the district's budget, supply accounts, and projections; exercise control over expenditures for conformance to budget, accounting standards, and funding guidelines for district programs and funds; supervise and evaluate the performance of assigned staff.

**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***

Plan, organize and exercise control over budget development and expenditures for conformance to budget, accounting standards, and funding guidelines for district programs and funds; evaluate new financial and operational guidelines. *E*

Develop a robust and flexible financial model to include revenue and expense forecasts, sensitivity analysis and position control through computer applications. *E*

Direct the evaluation of budget requests and expenditures and support Board of Education's review and approval. *E*

Formulate, develop, and implement policies and procedures for immediate and long-range financial management and planning for the District. *E*

Direct the preparation and maintenance of reports and forecasts; assist in the management of formalized revenue and expenditure exchange processes. *E*

Plan, organize and implement long and short-term programs and activities to improve assigned programs and services; analyze the district's financial position and develop recommendations for immediate and long range budget development. *E*

Direct the preparation and maintenance of detailed records of department functions and activities; develop and prepare a variety of financial and administrative reports for state, federal and internal reporting requirements. *E*

Provide technical expertise, information and assistance to the Executive Director, Financial Planning and Development, regarding assigned functions; assist in the formulation and development of policies, procedures and programs; advise the Executive Director, Financial Planning and Development, of unusual trends or problems and recommend appropriate corrective action. *E*

Represent the Financial Services Division and provide financial information in collective bargaining. *E*

Direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities and personnel. *E*

Plan, recommend, and implement fiscal policies which provide for adequate budgetary/staffing control; assure compliance with state and other agencies requirements. *E*

Communicate with other administrators, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange information; develop policies and procedures to encourage effective and efficient management controls; interpret district budgetary policies to management staff. *E*

Develop and prepare the annual preliminary budget for the department and division; analyze and review budgetary and financial data; control and authorize expenditures in accordance with established limitations. *E*

Direct the maintenance of the district's financial database and detailed cost ledger supporting documents for the general ledger and for audit requirements. *E*

Review existing and pending legislation for impact and compliance. *E*

Train and evaluate the performance of assigned staff; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. *E*

Perform related duties as assigned.

**EDUCATION AND EXPERIENCE:**

A combination of training, experience, and/or education equivalent to a bachelor's degree in accounting, finance, business or a related field and seven years of financial administration experience in a large public or private organization; four of the seven years must include supervisory experience in a complex, automated financial environment with progressively responsible fiscal and management assignments. A master's degree is preferred.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

**KNOWLEDGE OF:**

District, state and federal methodologies, procedures, and applicable laws, codes, and regulations related to district budget control.

Principles and techniques of budget preparation and control and strategic financial planning.

Oral and written communication skills.

Principles and practices of administration, supervision and training.

Applicable laws, codes, regulations, policies and procedures.

Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**

Provide leadership and direction in assigned functions.

Plan, organize and administer a district budget program in compliance with rules and regulations.

Develop a five-year financial plan and provide financial forecasting.

Determine the nature and scope of systems analyses or audits.

Design and develop financial accounting and management reporting models and systems through computer applications.

Maintain current knowledge of applicable provisions of federal, state and district laws, rules and regulations.

Communicate effectively both orally and in writing.

Establish and maintain cooperative and effective working relationships with others.

Analyze situations accurately and adopt an effective course of action.

Prepare comprehensive narrative and statistical reports.

Direct the maintenance of a variety of reports and files related to assigned activities.

Train and evaluate the performance of assigned staff.

Interpret, apply and explain rules, regulations, policies and procedures.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Indoor, office setting.

**PHYSICAL ABILITIES:**

Dexterity of hands and fingers to operate a computer keyboard; sitting or standing for extended periods of time; hearing and speaking to exchange information and make presentations; seeing to read and write reports; lifting light objects.

Issued: 5.25.10

Job Code 1613

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