

**SAN DIEGO UNIFIED SCHOOL DISTRICT**  
**POSITION DESCRIPTION**

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<b>TITLE:</b>	Manager, Budget Development	<b>REPORTS TO:</b>	Director, Budget Development
<b>DEPARTMENT:</b>	Budget Development	<b>CLASSIFICATION:</b>	Classified Management
<b>FLSA:</b>	Exempt	<b>SALARY GRADE:</b>	030 AASD Classified
<b>REVISED:</b>	June 18, 2013		

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**BASIC FUNCTION:**

Plan, organize, control, and manage district-wide budget development functions, including data quality management, standardized financial reports, central office and school site allocations, cost/benefit analysis and key assumptions, preliminary budget, position control management, and unrestricted revenue; 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, control, and manage district-wide budget development functions, including data quality management, standardized financial reports, central office and school site allocations, cost/benefit analysis and assumptions, preliminary budget, and unrestricted revenue. **E**

Manage the development of the District's budget and anticipated budget scenarios and perform ad hoc analysis for the Board of Education and District management. **E**

Oversee the development of a robust and flexible financial model to include revenue and expenditure forecasts and sensitivity analysis. **E**

Recommend and manage activities to streamline and automate the district's financial systems and processes; monitor and maintain data integrity of financial databases and ledgers; manage the maintenance and implementation of the District's budget development tool and provide training to District staff. **E**

Assist in the development of a financial governance model to include standardized financial reports, key performance indicators, performance benchmarks, and align spending to top priorities. **E**

Develop and implement financial models for strategic planning and budget development. **E**

Responsible for the preparation of the interim and the monthly financial reports required by the Board of Education, San Diego County Office of Education and state and federal agencies. **E**

Plan, organize and implement long and short-term programs and activities to improve assigned programs and services; develop recommendations for immediate and long-range strategic

planning and financial management. **E**

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

Evaluate, recommend, install and implement new system applications as required to improve efficiency and productivity on a district-wide level. **E**

Analyze the impact of assigned functions on district-wide financial systems. **E**

Represent the Financial Services Division and support District labor negotiations by calculating and providing financial impact of proposals and as well as disclosures required by the SDCOE. **E**

Prepare and maintain a variety of narrative and statistical reports, records, and files related to assigned activities and personnel. **E**

Communicate with district management staff and others concerning assigned functions; attend meetings on behalf of management staff as requested. **E**

Select, train, supervise, and evaluate the work of assigned staff. **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, education or a related field and five years of experience in financial administration in a large public or private organization, including experience in complex financial models and analysis. A master's degree is preferred.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

Microsoft Excel (macros, pivot tables, indexes, Solver) at expert level proficiency.

Complex financial models and analysis.

Budget preparation and control.

Advanced accounting principles, systems, and procedures.

Oral and written communication skills.

Principles and practices of effective supervision.

Applicable laws, codes, regulations, policies and procedures.

Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**

Provide leadership and direction in assigned functions.

Exercise sound judgment in preparing analyses.

Perceive organizational implications of recommendations and conclusions.

Design and develop financial accounting and management reporting models and systems.

Develop complex spreadsheets and schedules at an expert level in Microsoft Excel.

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.  
Interpret, apply and explain rules, regulations, policies and procedures.  
Meet schedules and time lines.  
Train, supervise and evaluate the performance of assigned personnel.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Indoor, office setting.

**PHYSICAL ABILITIES:**

Hearing and speaking to exchange information; seeing to perform assigned duties; sitting for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

Revised 6.18.13 – BOE approved effective 7.01.11  
Job Code 1657  
PH