



POSITION DESCRIPTION

JOB TITLE: <i>Budget Specialist</i>		JOB CLASS: 1110
DATE	DEPARTMENT OR SCHOOL Department of Financial Planning and Budget Services	DIVISION Office of Finance
Pay Schedule:	Pay Range:	FLSA STATUS: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non exempt
		EEO Category:
<p>POSITION SUMMARY: Develops, analyzes, executes and supervises budget processes. Evaluates the relationships between major program changes and the financial status of the District. Employs cost-benefit analysis to review financial requests, assesses program tradeoffs, and explores alternative funding methods. Provides leadership for school budget preparation, formulation, presentation, and execution. Examines past budgets. Estimates future financial needs. Ensures there are adequate funds for programs within the organization. Provides explanations for variances between actual results, forecasts, budgets and strategic plans. Conducts training regarding budget procedures. Provides critical costing information under extremely time sensitive circumstances.</p>		

DESCRIPTION OF THE JOB:

1. Analyzes budget data, prepares and revises cost projections and budget and expense projections for multiple programs and funds; analyzes and monitors line item expenses; provides supervisor with historical information; makes budget recommendations; initiates, transmits, and posts budget and expense transfers.
2. Supports budget development, tentative and adopted budgets and budget revisions; prepares financial reports for various stakeholders. Serves as lead on school budget allocation development, analysis, review and revisions. Maintains all related schedules, work papers and assumptions.
3. Provides direction and coordination over staff activities involving the department, analysis and written presentation of the official proposed and amended adopted budget documents. This includes the overview, narratives, tables, exhibits, schedules, glossaries, assumptions, revenue statements, expenditure and staffing summaries and multiple year forecasts.
4. Reviews and/or prepares current, historical and pro forma financial information and related activity output data to identify opportunities to: enhance fiscal planning, streamline processes and procedures, improve internal financial controls and improve managerial reporting. As appropriate, recommends improvements in fiscal practices and follows through on implementation of approved changes.
5. Prepares and maintains an updated five year budget projection with related schedules, work papers and assumptions. Stays current on all approved Board actions that affect the financial operations of the district and update five year budget projections accordingly. Seeks improvements to formats, processes and procedures used in multiyear forecasts.
6. Recommends methods for identifying budget variances and addressing year end surpluses and deficits at the school and district level. Schedules, oversees and expedites the fiscal year-end closing

of the financial records for the department's activities and programs. Determines and prepares year-end closing tasks. Provide explanations for variances between actual results, forecasts, budgets and strategic plans.

7. Performs special analytical projects as assigned and maintain professional and technical knowledge in order to uphold responsibilities as subject matter expert. Stays current with all related state and federal regulations governing financial management and reporting requirements.
8. Builds and maintains positive working relationships with co-workers, other District employees and the public using principles of good customer services.
9. Supervises department and/or project staff according to the established policies and practices of the Office of Finance as requested. Assign duties according to specified procedures, provides detailed instructions and frequently checks the work of others to ensure accuracy and timeliness.
10. Maintains confidentiality of personnel, programmatic and financial matters.
11. Actively supports the MPS Strategic Plan.
12. Performs other duties as assigned.

SUPERVISION RECEIVED: (Indicate the extent to which work assignments and methods are outlined, reviewed, and approved by others.)

The incumbent performs a variety of routine work within established policies and procedures and receives little instruction on day-to-day work. Receives general instructions on new assignments from the Director of Financial Planning & Budget Services.

SUPERVISION EXERCISED:

Coordinates the work of various staff, including Senior Budget Analysts, Budget Analysts, Accounting Specialists and Budget Planning Assistants.

JOB REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and ability required. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Education Requirements:

A bachelor's degree in Accounting, Finance, Public Policy or related field. A master's degree or equivalent knowledge needed; CPA and/or CGFM is highly desirable, but not required.

Experience Requirements:

Five plus years progressive experience in a combination of governmental accounting, budgeting and/or auditing. School district experience preferred.

Knowledge, Skills and Abilities:

Effective oral and written communication and presentation skills are essential. Advanced knowledge and understanding of project budgeting and fiscal management, demonstrated proficiency in database applications, spreadsheet development and electronic document preparation required. Knowledge of the structure, operations and requirements of federal, state and local financial regulatory and funding agencies. Knowledge of methods, practices, and terminology used in accounting, budgeting, forecasting and financial record keeping; state and federal reconciliation processes and reporting processes necessary. Knowledge of K-12 education planning methods, processes and systems desired.

Knowledge of methods, practices, and terminology used in accounting, budgeting and financial record keeping; state and federal reconciliation processes and reporting processes. History explaining complex financial information to non-financial individuals valuable and to be able to interface with senior level management and elected officials. Skill in examining and re-engineering operations and procedures, formulating process, and developing and implementing new strategies and procedures, recommending

best practices. Strong analytical, problem solving and critical thinking skills and project management skills essential. The ability to resolve complex problems and issues. Skill in developing policy and procedure documentation. Demonstrated negotiating skills. Must be able to work with a diverse population. Skill in working on several assignments simultaneously, setting priorities, organizing resources and meeting deadlines. Must be able to foster a cooperative work environment and work as part of a team.

WORKING ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

General office environment. *Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990.* Work involves meeting multiple demands on a timely basis. Duties require additional hours outside the normal workday seasonally.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job with or without reasonable accommodation.

General office environment, must be able to handle light lifting and occasional standing, bending.

THIS DESCRIPTION DOCUMENTS THE GENERAL NATURE AND LEVEL OF RESPONSIBILITY ASSOCIATED WITH THIS POSITION. IT IS NOT INTENDED TO BE A COMPREHENSIVE LIST OF ALL ACTIVITIES, DUTIES AND RESPONSIBILITIES REQUIRED OF INCUMBENTS. IT IS NOT INTENDED TO LIMIT OR MODIFY THE RIGHT OF ANY SUPERVISOR TO ASSIGN, DIRECT, AND MONITOR THE WORK OF EMPLOYEES UNDER SUPERVISION.

APPROVALS:

Supervisor _____ Title _____ Date _____

Compensation Services Manager _____ Date _____