



**POSITION DESCRIPTION**

<b>JOB TITLE: Budget Planning Assistant</b> Job Class: 1130	
<b>DATE</b>	Office of Finance  Budget
<b>Pay Schedule:</b>	<b>FLSA STATUS:</b> <input checked="" type="checkbox"/> <b>Exempt</b> <input type="checkbox"/> <b>Non exempt</b>
<b>Pay Range:</b>	
<b>Management Approval:</b>	
<b>POSITION SUMMARY and PURPOSE:</b> Assists in the preparation of the annual budget, fiscal studies and other informational studies. Assists and advises school and department administrators on issues pertaining to financial questions. Maintains data files on assigned schools and departments.	

**ESSENTIAL FUNCTIONS:** Indicate the approximate percentage of time devoted to each major task or group of related tasks. Summarize position in no more than 15 tasks, each of which requires at least 5% of incumbent's time.

**NOTE:** An essential function must meet the following criteria:

- 1) The reason the position exists is to perform that function,
- 2) No other employee is available to perform that function,
- 3) The function is highly specialized, and
- 4) Removing the function would fundamentally alter the job.

1. Assists staff in the development, analysis and written presentation of the official proposed budget documents, to include the overview, narratives, tables, exhibits, schedules, glossaries, assumptions, revenue statements, expenditures, staffing summaries and multiple year forecasts.
2. Compiles budget requests as part of the strategic planning process. Arranges online security and supervise non Finance department staff in entering data for the proposed budget cycle.
3. Assists principals and department heads in monitoring budgets and interpreting Board policies on fiscal matters such as expenditure control and fund transfers.
4. Assists in and maintains the preparation of communications, complex reports involving statistical data and supporting work papers as they relate to the budget process. Reviews fiscal data and written reports for accuracy.
5. Maintains calendar of due dates for staff and follows through on completion of tasks.
6. Maintains and updates various district financial management control systems, including the payroll/personnel/position control system and the budget management and accounting systems. Maintains orderly records and electronic/hardcopy files with appropriate backups for sharing.
7. Provides occasional assistance at Strategic Planning and Budget Committee meetings and Board meetings.
8. Performs training for staff in Finance and other departments as requested.

9. Distributes budget materials to entire school system and outside parties.
10. Maintains confidentiality of personnel, programmatic and financial matters.
11. Performs office management functions such as answering and routing phone calls, payroll, requisitioning budget and other related record maintenance duties.
12. Schedules meetings, arranges facilities for group meetings, interviews and in-services involving all levels of school district staff and outside parties.
13. Maintains excellent working relationships with all levels of management and staff.
14. Actively supports the MPS Strategic Plan.
15. Performs other duties as assigned.

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

General supervision by the Director, Budget and Planning

**SUPERVISION EXERCISED:** (List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following: (a) assign duties; (b) outline methods; (c) direct work in process; (d) review completed work; (e) sign or approve work; (f) make hiring recommendations; (g) prepare performance appraisal; (h) take or recommend disciplinary action.

Coordinates activities, no direct reports

**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** (Include certificates, licenses, and/or registrations required.)

Position requires a bachelor's degree in business, finance, accounting OR a related field.

**Experience Requirements**

One to three years of previous experience in a high-volume business/accounting/budgeting office. Familiarity with public sector is desired.

**Knowledge, Skills, and Abilities**

Effective oral and written communication and presentation skills are required. Excellent teamwork skills are essential. Strong analytical and public relations skills. The ability to develop effective working relationships with diverse individuals at all levels is required. Must have excellent planning and organizational skills. A strong working knowledge of computer applications to include MS Office software is required.

**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, occasional travel to school locations.  
*Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990.*

**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.**