

**San Jose/Evergreen Community College District
Confidential Job Description**

Position: Budget Analyst

Department: Fiscal Services

POSITION PURPOSE

Under general supervision, the Budget Analyst is a District Office classification that performs complex budgetary functions and other related fiscal responsibilities to support preparing, maintaining, and monitoring the District's financial, statistical and budget reports; formulates calculations and data analyses demonstrating potential fiscal impacts on proposed policy changes and operation costs to aid in budget planning and resource allocation; develops, evaluates and presents budget allocation strategies and illustrates allocation options for special projects; analyzes data and provides budget information for collective bargaining negotiations; contributes to and assists with budget setup, monitoring and preparation of reports to be submitted to the District for review and approval; ensures conformance to audits, budgets, reporting processes, and other regulations, policies and requirements; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS

Incumbents assigned to the classification are exposed to sensitive collective bargaining information and materials during the negotiating process and are designated as a confidential classification.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below exemplify the work of the classification and assigned duties may include work which is similar, related or a logical assignment to this class.

1. Oversees, implements and administers the technical processes, policies, and procedures of the budget systems according to an established budget development calendar; prepares, reviews, and inputs budget-related entries in the District's financial systems including developing assumptions and apportionments for tentative and adopted budgets; provides information to various offices on account codes, budget status, and other pertinent information.
2. Develops and completes balancing of District budgets and monitors the financial management systems for accuracy and proper financial reporting; assists fund administrators with setting up general ledgers and collaborates with managers in the colleges to monitor expenditures and revenues and ensures appropriate utilization of funds; reconciles federal, state and local agency reports and prepares financial data for quarterly and annual reports to the state and Board of Trustees; analyzes other budget information and prepares a variety of established and ad hoc reports.
3. Partners with ITSS, HR and payroll to ensure compliance and provides financial insights, plans and forecasts on financial impact of staffing and programmatic implementations; validates and projects the availability of funds for position control decision making; researches, analyzes and presents solutions to various complex budgetary and accounting problems.
4. Analyzes, interprets and identifies significant budget variances for the current and comparative fiscal years; identifies decision points for review by fiscal administrators; informs administrators, staff, and committees on the District's current financial health; provides executive management teams with operational and financial stability reporting using modeling and advanced data analyses to support strategic decision making and collective bargaining negotiations.

5. Analyzes and interprets legislative, state and federal directives; monitors and maintains internal controls over financial processes; conducts internal financial audits; coordinates and offers alternatives on policies concerning budget accountability.
6. Researches, compiles and presents financial data from various units and other funding sources including tuition and fees, grants and contracts, auxiliary enterprises, fundraising and other sources of revenue to support an integrated budget and resource planning model; coordinates with Human Resources to maintain, analyze and revise benefit rate tables; monitors and prepares reports on benefit costs; prepares and processes related corrections in respective databases.
7. Monitors, assesses and reports on the financial status of various projects and ensures continued financial viability and compliance with pertinent statutes and regulations including the Fifty Percent Law; verifies and processes budget-change requests in compliance with procedures and requirements; ensures funds balance for inter-fund transfers; adheres to and supports auditing procedures of the activities of the fiscal services office.
8. Provides technical expertise and resources to faculty, staff and administration on related budgetary matters; prepares training manuals and leads training events on budget preparation, accounting procedures and policies; communicates with multiple internal departments and outside agencies to prepare and submit required/requested reports.
9. Researches, compiles, analyzes and summarizes data for standard reports and special projects to include the 311 Report and Budget Resolutions; participates in the annual policy and procedure review cycle in compliance with legal, District and accreditation requirements.
10. Contributes to, and assists with, presentations to be presented to the Board of Trustees and to other board-level groups.
11. Serves on committees and assists with District, local, regional, state and national conferences, meetings, workshops and training seminars as directed.
12. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

1. Generally accepted accounting and auditing principles, practices, and procedures.
2. Grant agency practices, procedures, and requirements.
3. Financial analysis and research procedures.
4. Budget preparation and control; California community college budgeting, accounting, purchasing, and organizational policies and procedures.
5. Provisions of collective bargaining agreements.
6. Pertinent federal, state and local laws, codes and regulations.
7. Integrated financial management systems.
8. Federal, state and other applicable laws and regulations and District policies and procedures governing grant administration, admission and attendance including applicable sections of California Education Code, Title 5, - Family Educational Rights and Privacy Act (FERPA).
9. Principles and practices used in the preparation of comprehensive, clear, and concise reports.

10. Principles, practices, methods and techniques of program, administrative and organizational analysis and planning.
11. Practices and techniques of sound business communication; correct English usage, including spelling, grammar and punctuation.
12. Board Policies, Administrative Regulations, Accrediting Commission for Community & Junior Colleges Standards, Human Resources procedures and collective bargaining agreements.

Skills and Abilities to:

1. Reconcile, balance and audit various records and accounts.
2. Compile, analyze and record financial and statistical data.
3. Interpret, apply and explain administrative and departmental rules, regulations, policies and procedures.
4. Maintain confidential and administrative records and files.
5. Plan and organize work to meet schedules and time lines.
6. Provide accurate and timely reporting and accountability.
7. Prepare comprehensive and accurate reports and reviews.
8. Present solutions to management with confidence and effectiveness.
9. Determine work priorities and analyze situations using sound judgment in the application of policies, rules, regulations and standard operating procedures.
10. Communicate effectively, both verbally and in writing, with faculty and staff, students, and community members.
11. Estimate and ensure adequate resources to meet material, labor, equipment and time requirements.
12. Understand, interpret, explain and apply applicable rules, regulations, policies and procedures, laws, codes and ordinances.
13. Contribute in building cohesive and effective work teams.
14. Establish and maintain cooperative and effective working relationships with others.
15. Operate a computer, assigned office equipment and standard business applications.

Education and Experience:

1. A bachelor's degree from an accredited institution in business, accounting, finance or a closely related field.
2. Two years of progressively responsible experience providing accounting or budgeting services.
3. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socio-economic, gender identity, sexual orientation, cultural, disability, and ethnic backgrounds of the students we serve and sensitivity to and knowledge and understanding of groups historically underrepresented, and groups who may have experienced discrimination.

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employees work under typical office conditions, subject to frequent interruption and to intermittent exposure to individuals acting in a disagreeable fashion. The employee may be required to travel to locations other than assigned work site, and occasional evenings, holiday and/or weekend work may be required.

Physical Demands:

While performing the duties of this class, employees are primarily in a stationary position and are required to move about the office to access office machinery, files, etc.; perform constant operation of a computer and other communication and office equipment; observe details at close range; and move or lift up to 10 pounds.

Mental Demands:

While performing the duties of this class, employees are regularly required to accurately communicate information and other ideas clearly and effectively using written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks; work with frequent interruptions; work independently and under intensive deadlines; and interact with District managers, staff, the public and others encountered in the course of work.

Board Approved: December 9, 2025
Salary Range: C-125
EEO Category: 2B2- Other Professionals