

BUDGET ANALYST SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Effective Date</u>
4739(0099)	Budget Analyst I	02	350	6 mo.	08/22/90
4740(0099)	Budget Analyst II	01	350	12 mo.	08/22/90
4741(0099)	Budget Analyst III	01	350	12 mo.	08/22/90

Promotional Line: 315

Series Narrative

Employees in this series perform professional budgeting and analysis of fiscal operations. They review budgets, prepare and reconcile budget reports, maintain budget systems, design computerized budget systems, and analyze budget policies and procedures. Due to the nature of these positions, they are generally utilized in a central campus budget unit. The work requires a knowledge of fiscal management principles, budget theory, accounting theory, and computer applications.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Budget Analyst I **4739(0099)**

Employees at this level are entry level analysts who apply fiscal management principles and practices to a limited range of budgeting, accounting, and other fiscal functions. They work under general supervision from a designated supervisor.

A Budget Analyst I typically--

1. reconciles reports, noting apparent errors or inconsistencies
2. reviews budget request documents for accuracy, completeness, and conformance to guidelines
3. posts budget information to journals, registers, ledgers, or other related records manually or using automated means; makes adjustments, prepares reports, and reconciles accounts
4. assists in preparing budget reports for various planning documents for the institution
5. maintains files on budget request documents
6. performs other related duties as assigned

Level II: Budget Analyst II **4740(0099)**

Employees at this level are experienced analysts who apply fiscal management principles and practices to a variety of responsible budgeting, accounting, and/or other fiscal functions. They work under direction from a designated supervisor.

A Budget Analyst II typically--

1. assists in the review and revision of campus operating budgets and prepares them for submission to appropriate personnel
2. prepares and reconciles complex budget reports
3. assists in the development, evaluation, implementation, and operations of automated or manual budget systems
4. examines budget request documents to verify conformance to pertinent policies, procedures, and budget standards
5. prepares reports and statements requiring interpretation and analysis of financial records
6. participates in meetings on budget issues and policies
7. provides standard interpretation of budget policy, budget procedures, and other management procedures
8. may supervise lower level staff as required
9. performs other related duties as assigned

Level III: Budget Analyst III

4741(0099)

Employees at this level are advanced analysts who: (a) perform complex and specialized analysis or (b) supervise professional, technical, and/or clerical employees engaged in various budgeting or other fiscal operations. They work under administrative direction from designated budget officers.

A Budget Analyst III typically--

1. directs the day-to-day operations of a budget section and may supervise professional, technical, and/or clerical employees, including planning, assigning, and reviewing work activities
2. coordinates the preparation of operating budgets for all or selected departments on campus
3. coordinates the review revision of all or selected campus operating budgets and prepares for submission to appropriate personnel
4. reviews non-standard budget reports, budget theory, and trend analysis; recommends actions or alternatives to management
5. develops specialized automated budget systems independently or in conjunction with data processing personnel; interprets such systems and resultant reports, identifying problems and changing requirements; recommends and/or implements changes and modifications
6. assists in assuring that budget and financial reporting systems and procedures are in compliance with university, state, and federal statutes, policies, and rules

7. provides technical advice and services to campus unit managers, including interpreting budget reports
8. participates in the preparation of annual budgets, annual reports, and other financial reports for the preparation of planning documents for the institution; participates in meetings on budget issues and policies
9. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Budget Analyst I

4739(0099)

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one, or any combination, of the following types of preparation:
 - (a) credit for college training leading to a major in accounting, business administration, finance, computer science, or closely related fields
 - (b) progressively responsible experience that provided a knowledge of generally accepted principles, theories, and practices used in budgeting, accounting, and the analysis of fiscal operations that would assure the applicant's overall ability to undertake professional budgeting work at the entry level. Such experience must be evaluated on the basis of its comparability to a normal curriculum in the academic programs listed in "a," taking into account the relationship of the experience to the content of the courses in the curriculum.*

that totals 1.0 unit according to the following conversion rates:

120 semester hours (or a Bachelor's degree) in "a" = 1.0 unit

3 years of "b" = 1.0 unit.

Amounts of education or experience less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

* In substituting experience for education as provided above, it is recommended that, in order to ensure consistent application of these qualifications, the evaluation and verification of an applicant's experience be accomplished through the cooperative efforts of the personnel office and an experience budget professional in a manner that will preserve the applicant's anonymity.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of the basic theories, principles, methods, and procedures of professional accounting
2. knowledge of office methods and procedures
3. knowledge of automated data processing systems
4. ability to prepare complete and accurate budget reports
5. ability to perform detailed work involving the application of accounting theory to routine budget problems
6. ability to analyze and interpret less complex accounting records and reports
7. ability to perform detailed work involving written or numerical data
8. ability to make arithmetical calculations rapidly and accurately
9. ability to operate office machines and computer equipment
10. ability to work effectively with others

Level II: Budget Analyst II**4740(0099)**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of training/experience requirements listed for level I of this series
2. three years of experience comparable to that gained at level I of this series and that included experience with computerized budgeting and/or accounting systems. [A Master's degree in accounting, business administration, finance, computer science, or closely related fields or registration as a Certified Public Accountant may be substituted for one year of experience.]

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. broad knowledge of the theories, principles, methods, and procedures of professional accounting
2. broad knowledge of office methods and procedures
3. skill in the operation of office machines and computer equipment
4. ability to analyze and interpret more difficult accounting records and reports
5. ability to evaluate more difficult budget problems
6. ability to prepare difficult budget records and reports completely and accurately

Level III: Budget Analysts III

4741(0099)

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of training/experience requirements listed for level II of this series
2. three years of experience comparable to that gained at level II of this series

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. extensive knowledge of the theories, principles, methods, and procedures of professional accounting
2. ability to analyze and interpret complex accounting records
3. ability to evaluate complex budget problems
4. ability to prepare comprehensive reports
5. ability to supervise a staff of subordinates engaged in budgeting activities
6. ability to deal tactfully with controversial problems

Budget Analyst I
Budget Analyst II
Budget Analyst III

(NEW)
(NEW)
(NEW)