

TITLE	CLASSIFICATION	SALARY RANGE
Budget Coordinator	Management Team Confidential	12

**SCOPE OF POSITION:**

Under the direction of the Senior Director, Fiscal Services, perform professional accounting and budgeting duties; provide technical expertise and staffing cost analysis to support fiscal decision making; analyze, verify, audit and reconcile fiscal records to ensure accuracy and completeness of transactions; prepare and audit complex financial and budgetary statements and reports.

**KEY DUTIES AND RESPONSIBILITIES:**

*Examples of key duties are interpreted as being descriptive and not restrictive in nature. Incumbents routinely perform approximately 80% of the duties below.*

1. Develop budgets and prepare related documents for District funds; develop and establish budget calendar and instructions; create spreadsheets, project revenue and expenditures; perform audits and system rolls; collect information from departments; compile and submit Board agenda items to approve increases or decreases to the adopted budget.
2. Provide technical expertise and guidance to staff regarding standards, practices, requirements, laws, regulations, policies and procedures; deliver staffing cost analysis to support fiscal decision-making by calculating salary savings on unfilled positions and salary/benefit cost projections.
3. Review and approve budget transfers, personnel action forms and position request forms for hiring District employees; confirm budget coverage and adherence to District policies for hiring; encumber hourly salaries to ensure budget control.
4. Develop and maintain account code structure for General Obligation Bond and capital outlay funds; prepare financial analysis and reporting for Citizen's Bond Oversight Committee; create and update spreadsheets to monitor capital project revenue and expenditures; reallocate capital outlay budgets.
5. Analyze, verify and reconcile fiscal records and audit work performed by others to ensure the accuracy and completeness of transactions; monitor salary and benefit budgets relative to actual expenditures; identify and resolve discrepancies between financial and personnel and payroll data systems.
6. Maintain the District and Foundation chart of accounts; create, update and expire account component fields and account codes according to State regulations and District needs.
7. Assign user access for District financial software and provide support and trouble-shooting for end users; train District staff on financial software; develop and maintain the financial transactions handbook and various user guides.
8. Prepare monthly financial statements for the Foundation and the Shone Farm Foundation; review and audit receipts and disbursements; identify and resolve discrepancies; reconcile contributions to Foundation records; create month-end journal entries and fiscal year-end closing transactions.
9. Prepare, maintain and audit financial reports, tax returns and financial surveys; prepare sales and use tax returns for the State Board of Equalization.
10. Review broker statements for the Foundation, evaluate investment activity and allocate and post earnings to endowment and annuity funds.
11. Prepare financial records, spreadsheets and supporting documentation for annual audit; work with external auditors to research inquiries, provide detailed narratives and resolve discrepancies.

**KEY DUTIES AND RESPONSIBILITIES – Continued**

12. Develop and maintain cost recovery documents per Federal Emergency Management Agency (FEMA) and California Office of Emergency Services (CA OES) guidelines; compile and organize documentation in the event of an emergency/disaster; prepare claims for State and/or federal cost recovers; attend workshops to remain current on FEMA and CA OES cost recovery regulations.
13. Provide technical information and assistance to the Senior Director regarding assigned functions; assist in the formulation and development of policies, procedures and programs.
14. Communicate with other faculty, staff, students and external organizations to coordinate activities and programs, resolve issues and exchange information.
15. Train and provide work direction to assigned staff.
16. Research, compile, verify and analyze budget and financial data to support District negotiations; maintain confidentiality of privileged and sensitive information.

**KNOWLEDGE OF:**

1. Accounting theory, principles and procedures related to public entity accounting including budget preparation, administration and control.
2. Federal, State and local laws and regulations related to community college financial operations including related District policies and procedures.
3. General audit requirements including schedules and documentation.
4. Financial software systems including automated accounting, electronic spreadsheets and databases.
5. Oral and written communication skills.
6. Interpersonal skills using tact, patience and courtesy.
7. Operation of a computer and assigned software.

**ABILITY TO:**

1. Prepare, maintain and audit comprehensive financial statements, fiscal reports and spreadsheets.
2. Maintain confidentiality of privileged and sensitive information.
3. Communicate effectively both orally and in writing.
4. Interpret, apply and explain rules, regulations, policies and procedures.
5. Establish and maintain cooperative and effective working relationships with others.
6. Operate a computer and assigned office equipment.
7. Analyze situations accurately and adopt an effective course of action.
8. Meet schedules and time lines.
9. Work independently with little direction.
10. Plan and organize work.
11. Demonstrate sensitivity to, and respect for, a diverse population.

## Budget Coordinator

### **QUALIFICATIONS:**

*Candidates/incumbents must meet the minimum qualifications as detailed below, or file for equivalency. Equivalency decisions are made on the basis of a combination of education and experience that would likely provide the required knowledge and abilities. If requesting consideration on the basis of equivalency, an Equivalency Application is required at the time of interest in a position (equivalency decisions are made by the supervising administrators, in coordination with the department where the vacancy exists, if needed.)*

### **EDUCATION:**

Bachelor's degree in finance or related field.

### **EXPERIENCE:**

Increasingly responsible experience performing financial analysis, reconciliations and report preparation.