

Classification and Qualification STANDARDS

Budget Analyst Series

Class Title	Class Code	Issue Date	FLSA
<i>Budget Analyst</i>	5287	10-01-2012	<i>Non-Exempt</i>
<i>Senior Budget Analyst</i>	5284	10-01-2012	<i>Exempt</i>

OVERVIEW:

Under general supervision, the Budget Analyst Series encompasses those positions whose primary function is to perform the budget analysis work required to administer the California State University budgetary program and provide consultative budget services to an assigned area. The series consists of the Budget Analyst and the Senior Budget Analyst. The Budget Analyst often provides assistance to the Senior Budget Analyst by handling assigned phases of the budget analysis work while the Senior Budget Analyst is responsible for the full scope of assigned projects, including managing special studies and developing reports.

Budget Analyst – Perform budget analysis work required to administer the CSU budgetary program and assist in providing consultative budget service to campus constituents. Incumbents in this classification are assigned to assist and may work with or under the guidance of Senior Budget Analysts and management.

Senior Budget Analyst – Independently perform complex budget analysis work required to administer the CSU budgetary program and provide consultation to campus constituents. Incumbents in this classification are assigned the budget analysis work for an assigned area. The nature of this work is predominantly more complex and responsible and requires greater in-depth analysis than does the work performed by Budget Analysts.

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Budget Analysts; they are not meant to be all-inclusive or restrictive. Work assignments may involve other related activities within the scope of each classification.

Budget Analysts typically perform some or all of the following duties: review, analyze, and develop recommendations on budgetary and related fiscal affairs of an assigned area; analyze budget requests and perform continuous budgetary control of revenue and appropriations; review of balance sheet items in evaluating financial resources available and impact on a budgetary program; prepare monthly and year-end closing journal entries, including systemwide transactions; perform cash flow modeling; manage fund balances, enterprise fund budgeting and reconciliations, FIRMS budget submission and capital project modeling; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports; and use current computer word processing and spreadsheet software programs, web browsers, query tools, integrated financial systems and/or other types of records management systems.

BUDGET ANALYST

This is the first level of professional budgeting work requiring general knowledge and understanding of budget and financial accounting principles and practices. Under general direction, incumbents are given less complex work assignments that expand the incumbent's practical experience and develop professional judgment in the application of budgeting principles. May provide work direction to other professional and/or technical staff.

Work assignments typically include some or all of the following: survey and investigate budget matters, including collecting information from national databases and other institutions of higher education; consult with and advise

responsible officials on fiscal organization, fiscal procedure and related problems; analyze budget requests, including projection and revenue costs, posting of budget data to journals, registers or ledgers, and perform continuous budgetary control of appropriations; draft text materials to summarize, analyze, and justify budget programs; gather data and conduct studies on various problems arising in connection with financial administration; assist higher level budget analysts and management with position control, labor cost distribution and budgetary control functions; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports and correspondence for higher level review; document and maintain business processes, standards and procedures; provide initial troubleshooting of financial systems problems; participate in the design and installation of financial systems upgrades and required testing and verification of results; conduct extensive financial data compilation, querying and drilling on large volumes of financial data; and use integrated financial systems and/or other types of records management systems.

MINIMUM QUALIFICATIONS:

Knowledge and Abilities:

General knowledge of financial, budgetary and accounting principles and practices. Working knowledge of the principles and practices of public finance, administrative, personnel fiscal management and cash-flow management; research techniques and statistical principles and procedures; advanced proficiency with current word processing and spreadsheet software programs, web browsers, query tools, integrated financial systems and/or other types of records management systems. Familiarity with the principles of position control and budgetary alignment. Ability to define problem areas, collect data, perform preliminary analyses and make appropriate recommendations; and write clear and concise analytical comments.

Experience:

Two years of progressively responsible professional experience in analyzing data including one year involving duties such as preparation, justification and analysis or the control and administration of a budget or budgetary process.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.

SENIOR BUDGET ANALYST

Incumbents in this classification independently perform the full range of professional budgeting work which requires a thorough knowledge and understanding of budget and financial accounting principles and practices.

Work assignments typically include some or all of the following: independently survey and investigate more complex budget matters, including collecting information from national databases and other institutions of higher education; consult with and advise responsible campus officials on budget requests, including projection and revenue costs, posting of budget data to journals, registers or ledgers and perform continuous budgetary control of appropriations; draft text material to summarize, analyze, and justify budget programs; gather data and conduct studies on various problems arising in connection with financial administration; assist management with position control, labor cost distribution and budgetary control functions; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports and necessary correspondence; develop business processes, standards and procedures; provide initial troubleshooting of financial systems problems and participate in the design and installation of financial systems upgrades and required testing and verification of results; conduct extensive financial data compilation, querying and drilling on large volumes of financial data; and use integrated financial systems and/or other types of records management systems. Incumbents may be assigned responsibility for providing training, guidance and assistance to other employees and may provide lead work direction to other professional and/or technical staff.

MINIMUM QUALIFICATIONS:

Knowledge and Abilities:

Thorough knowledge of financial, budgetary and accounting principles and practices. General knowledge of the purpose, functions, and fiscal organization of the campus(es); principles of position control and budgetary alignment. Working knowledge of the principles and practices of public finance, administrative personnel, fiscal management and cash-flow management; research techniques and statistical principles and procedures; advanced proficiency with current word processing and spreadsheet software programs, web browsers, query tools, integrated financial systems and/or other types of records management systems. Knowledge of or ability to learn quickly the financial structure and financial procedures of the CSU. Ability to analyze and review the budgets and financial practices of the campus(es), communicate clearly and present complex budget information in a clear, concise and professional manner, analyze situations accurately, and develop an effective course of action.

Experience:

Three years of progressively responsible analytical experience including two years performing work involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.