

SANTA CLARA COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: BUDGET ANALYST (CONFIDENTIAL)

BASIC FUNCTION:

Under the general direction of the Director III - Internal Business Services, serves in a lead capacity to coordinate and plan the development, allocation, and reporting of complex budgetary and financial activities for the SCCOE's budget; advises, manages, directs, supervises and serves as expert resource on budgeting and attendance accounting; prepares, reviews, analyzes, and audits a wide variety of financial reports, including program budgets, Local Control Funding Formula (LCFF) and other revenue projections, attendance reports, year-end closing transfers and reports; supervises and evaluates the performance of assigned personnel.

DISTINGUISHING CHARACTERISTICS:

This position is designated as confidential pursuant to Government Code section 3540.1(c). Incumbents may regularly access, develop, and/or be entrusted with information relating to labor relations, including collective bargaining strategies, negotiations, grievances, and other employer-employee relations matters, the disclosure of which would compromise the Office's position in labor negotiations.

REPRESENTATIVE DUTIES:

The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.

ESSENTIAL DUTIES:

- Manages, plans, organizes and serves in a lead capacity in the preparation and review of the SCCOE budget, budget revisions financial and attendance reports, including, P-1, P-2, and P-A attendance reports.
- Reviews, analyzes and audits County Office financial reports, including monthly financial reports, on-going budget revisions, salary account change forms, and audit reports.
- Provides technical expertise and guidance for programs, and to staff, on financial matters, including preparation of revenue projections and calculations, budget development, and year-end reporting for the Local Control Funding Formula (LCFF).
- Researches and keeps current with LCFF and the Local Control Accountability Plan regulations.
- Prepares and presents budget workshops for all program staff.

- Directs, manages, plans, selects, coordinates, and assigns work to support staff; determines workload priorities and adjust assignments as needed to meet established timelines.
- Plans, directs and monitors special projects; serves as a liaison for and confers with auditors; advises and answers financial questions.
- Directs the preparation and maintenance of a variety of narrative and statistical reports, records and files; determines data needs for various financial reports; tests validity of collected data.
- Provides expert guidance and direction to budget and program staff in the preparation of the annual budget, and budget staff for preparation of year-end closing.
- Monitors, analyzes and reviews attendance data and reports relating to SCCOE and charter schools.
- Conducts site audits of charter school attendance and resolve issues and conflicts between the charter school and the district of residence, in coordination with relevant personnel.
- Researches, analyzes, interprets and applies laws, regulations, and policies governing county offices and provides guidance to county office administration; interprets and analyzes policies and regulations; provides guidance and acts as a resource for the interpretation of SACS Codes.
- Directs the preparation of and prepares comprehensive and detailed reports to assist senior management and other policy makers in formulating decisions, and developing and implementing policies and procedures that impact County Office operations.
- Directs the preparation of, and prepares, revises and recommends policies and procedures as they relate to the county office.
- Provides analytical budget reports as requested, monthly budget revision reports and assists in preparing responses to questions by upper management and Board of Education.
- Researches and analyzes State reports that impact County Office funding to ensure the County Office complies with State statutes.
- Serves as the backup for budget-related information in the absence of the Director III - Internal Business Services at Board and Budget Study Committee meetings, and as directed and needed.
- Determines and manages workload priorities and adjust assignments to meet established timelines.
- Supervises and evaluates the performance of assigned personnel; interviews and selects employees, reassignments, terminations and disciplinary actions; directs, approves, and assists staff in the development and delivery of in-service training programs on related areas.

OTHER DUTIES:

- Performs other related duties as assigned.

KNOWLEDGE, ABILITIES AND COMPETENCIES:

KNOWLEDGE OF:

- Accounting, budgeting, financial analysis and research techniques as they apply to the county office.
- Generally accepted accounting principles (GAAP), California Schools Accounting Manual (CSAM), Governmental Accounting Standards Board (GASB) pronouncements, generally accepted auditing standards, and other advanced principles, techniques and methods of governmental accounting, auditing and budgeting.
- Recent developments, current literature, and sources of information regarding accounting and financial systems.
- Computer information system operations and applications relating to accounting, auditing, budgeting, attendance accounting and financial management.
- Financial and statistical analysis techniques and principles.
- Recent developments, education code changes, current literature, and sources of information regarding accounting and school financial management.
- Pertinent federal, state and local statutes and codes pertaining to educational finance.
- Preparation of financial statements and comprehensive accounting reports.
- Accounting, budget and business functions of an educational organization.
- Calculation of the Local Control Funding Formula (LCFF).
- Financial analysis and projection techniques.
- Standardized Account Code Structure (SACS).
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.
- Operation of a computer and assigned software.
- Oral and written communication skills.

ABILITY TO:

- Supervise, manage and evaluate the performance of assigned staff.
- Interpret, apply and explain laws, education codes, regulations, policies and procedures and court decisions affecting the county office of education.
- Maintain current knowledge of related legislation.
- Provide advice, guidance and support to program managers in areas related to budgeting, accounting and internal controls.
- Design and prepare computer spreadsheets to analyze data.
- Perform financial and other statistical analysis.
- Provide financial analysis and develop financial models based on historical and projected trends. Perform specialized and technical services requiring the application and interpretation of data, facts, procedures, and policies.
- Apply accounting and budgeting principles and procedures.
- Make sound decisions regarding developing and implementing policies and procedures.
- Prepare clear and concise financial and accounting analysis reports.
- Evaluate revenue and expenditures projections and forecasts to determine reasonableness.
- Analyze data, draw logical conclusions, and prepare comprehensive reports.

- Maintain a high degree of integrity in the maintenance of financial records.
- Establish and maintain cooperative working relationships with those contacted in the course of work.
- Plan and organize work to meet schedules and deadlines.
- Work independently with little direction.
- Design and implement computer worksheet and programs.
- Communicate effectively both orally and in writing.
- Demonstrate highly developed and effective interpersonal skills.
- Operate a computer and assigned software and office equipment.

LEADERSHIP TEAM COMPETENCIES

- Develops and fosters effective individuals and teams.
- Operationalizes the organizational vision, mission, goals, shared values and guiding principles.
- Demonstrates emotional intelligence.
- Models inclusive, effective, and authentic communication.
- Applies understanding of how identities and experiences influence access and opportunity to inform practices and decisions.
- Builds and sustains positive, trusting relationships.
- Conducts SCCOE operations with the highest moral, legal and ethical principles.

EDUCATION AND EXPERIENCE:

Any combination equivalent to:

- Bachelor’s degree from an accredited college or university with major course work in accounting, business administration or a related field and
- Four years of responsible accounting, budgeting and auditing experience in an educational organization or educationally related auditing agency.

LICENSES AND OTHER REQUIREMENTS:

- Valid California driver's license.

WORKING CONDITIONS:

ENVIRONMENT:

- Office environment.
- Driving a vehicle to conduct work.

PHYSICAL DEMANDS:

- Hearing and speaking to exchange information and make presentations.
- Dexterity of hands and fingers to operate a computer keyboard.
- Seeing to read a variety of materials.
- Bending at the waist, kneeling or crouching to retrieve and file materials.

- Sitting for extended periods of time.
- Lifting light objects.

HAZARDS:

- Slipping, tripping, falling.
- Ergonomic injuries, repetitive motion injuries, eye strain.
- Indoor air pollution.

Disaster Service Worker

It is hereby declared that the protection of the health and safety and preservation of the lives and property of the people of the state from the effects of natural, manmade, or war-caused emergencies which result in conditions of disaster or in extreme peril to life, property, and resources is of paramount state importance requiring the responsible efforts of public and private agencies and individual citizens. In furtherance of the exercise of the police power of the state in protection of its citizens and resources, all public employees are hereby declared to be disaster service workers subject to such disaster service activities as may be assigned to them by their superiors or by law. Ca. Gov. Code § 3100

Approved by Personnel Commission: June 18, 2014

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Marisa Perry
Director III – HR / Classified Personnel Services

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