

DIRECTOR OF BUDGET AND MANAGEMENT ANALYSIS

DEFINITION

Plans, organizes, coordinates, evaluates, and directs the District's budget planning, formulation, analysis, and management activities.

TYPICAL DUTIES

- Develops projections of revenue and expenditures and constructs alternative financial models for use in financial planning.
- Develops and directs a program of financial analysis using a wide range of analytical methods such as cost-benefit analysis, cost-effectiveness, trend analysis, marginality, and economy of scale.
- Directs and reviews the results of studies in the field of educational institution finance, budgeting, and other forms of financial research used to develop financial forecasts.
- Directs the analysis of operating budgets submitted by organizational units of the District for consistency with District objectives, policies, and procedures.
- Directs the analysis of budget, financial and accounting reports to measure performance and identify deficiencies which affect the financial soundness and ability of the unit to meet financial and operational performance standards and goals.
- Directs and participates in the development and revision of policies, procedures, practices and guidelines pertinent to the administration of the District's budget management and financial planning program.
- Provides technical advice and guidance to District administrators on the development, implementation, and management of financial resources for their operations.
- Advises the Chief Financial Officer/Treasurer and District management staff through oral and written reports of objectives, critical problems, achievements, improvement recommendations, and on requirements and restrictions of laws, rules, and policies affecting the District's budget management and financial planning functions.
- Coordinates the work of the unit with the colleges and other divisions.
- Analyzes state legislative and administrative decisions, regulations, and policies to determine their impact on the budget management and financial planning operations of the District and makes recommendations on how to implement new requirements.
- Directs the design, implementation, and maintenance of integrated information systems applicable to the District budget management and financial planning functions and recommends improvements.
- Represents the District before state and local agencies on matters related to District financial planning and budget management.
- Directs and prepares correspondence, reports, and presentations regarding financial planning and budget management activities.
- Plans, schedules, and reviews the work of assigned budget and financial planning staff.
- Develops and oversees the maintenance of the office budget.
- May act on behalf of the Chief Financial Officer/Treasurer on designated matters.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

A **Director of Budget and Management Analysis** is responsible for planning, developing, implementing, managing and evaluating the District's budget and financial resources.

A **Chief Financial Officer/Treasurer** is the executive head over all financial operations of the District and its colleges which include treasury, general and special funds accounting, budget, payroll, tax, audit, and related activities. The Incumbent in this class is also responsible for directing the establishment of financial and accounting system controls and standards and ensuring timely financial and statistical information for management and/or Board use.

SUPERVISION

General direction is received from the Chief Financial Officer/Treasurer. General supervision is exercised over management, professional, technical, and clerical staff assigned to the unit.

CLASS QUALIFICATIONS

Knowledge of:

- Principles, concepts and theories of financial planning and management
- Principles, methods, and techniques of budgeting
- Principles, methods, and techniques of accounting with an emphasis on governmental accounting
- Principles, practices, and procedures of auditing
- Banking and investment policies, regulations, and practices
- Computer systems, applications, and hardware used in financial and budgetary management
- Research, statistical, and forecasting methods used in financial analysis, planning, and management
- Current trends and developments in financial planning and management and related fields
- Sources and bases of funding for post-secondary educational institutions and programs in the State of California
- Federal, state and local laws, ordinances, codes, and regulations related to financial management of a community college
- State legislative processes and procedures
- Organization, functions, and inter-relationships of operating units and programs of the District
- Principles and practices of organization and management
- Principles and practices of business and public administration
- Principles of supervision and training

Ability to:

- Plan, direct, and coordinate the District's financial planning and management activities
- Develop, implement, and modify budget and financial plans to meet District objectives
- Develop financial forecasts based on research data
- Design and manage effective control, information and documentation systems
- Interpret and apply laws, rules, regulations, and policies related to financial management
- Anticipate conditions, plan ahead, establish priorities, and meet schedules
- Act independently and promptly to situations and events

Ability to (Cont.)

Effectively utilize computer systems and software in the performance of duties

Recognize critical elements of problems, develop and evaluate data, determine solutions, and make logical recommendations

Prepare effective written and oral communications, reports, and presentations

Effectively communicate highly technical information concisely and in understandable terms

Provide leadership and technical assistance to others

Motivate, direct, train, and develop others

Stimulate teamwork and promote cohesiveness to achieve unit and District goals

Establish and maintain effective working relationships with administrative District personnel and representatives of government agencies and various private organization

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized four-year college or university preferably with a major in accounting, business administration, economics, finance, public administration, or a closely related field, **OR** a valid license to practice as a Certified Public Accountant in California. An advanced degree in one of the aforementioned majors is desirable.

Experience:

Five years of full-time, paid professional-level experience in financial management. Two years of the required experience must have been in a recent administrative or supervisory position over financial operations. Experience in public finance is desirable.

Special:

A valid Class "C" California driver's license must be obtained within 60 days of appointment.

Access to an automobile.

Must meet the requirements for bonding.