



BUDGET ANALYST

JC: FA100
PG: 8-SEIU
FLSA : Non-exempt

PC: 713
BU: 04

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general supervision, performs professional analysis work related to budgeting, forecasting, budget controls, accounting and information systems; performs related work as assigned.

CLASS CHARACTERISTICS

This class is responsible for compilation, revision and analysis of the District's or department's annual operating budget. Successful performance of the work requires strong analytical skills and skill in performing comparative analyses of budgeted and actual data. This class is distinguished from Senior Budget Analyst in that the latter is assigned more complex budget analyses projects and provides costing support for labor negotiations.

EXAMPLES OF DUTIES – *Duties may include, but are not limited to, the following:*

1. Reviews and verifies budget documents for completeness and accuracy.
2. Reviews vendor invoices; determines accuracy of charges and funding availability; processes vendor invoices for payment.
3. Prepares cost studies to identify the implications of budget assumptions.
4. Coordinates the assembly and dissemination of budget documents and reports.
5. Participates in the development of budgeting and reporting procedures.
6. Analyzes, reconciles and develops procedures for reporting budget variances to appropriate departments or District management
7. Reviews contracts, agreements and purchase requisitions and ensures availability of funding. Analyzes proposed financial projects and commitments versus budget allocations; recommends payment action based on funding ability for requested expenditures.
8. Develops procedures for tracking financial commitments; prepares financial reports and cost studies using various statistical and analytical techniques.

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9. Makes recommendations for procedural changes based on study results; reviews and verifies financial and budgeting data to ensure accuracy.
10. Provides technical assistance to department budget coordinators on non-labor and labor matters.
11. Develops new computer applications to improve quality and timeliness of reporting; works with information systems staff to implement program modifications.

QUALIFICATIONS

Knowledge of:

- Principles of budgetary administration
- Business computer user applications particularly related to budgetary and financial information reporting
- Financial/statistical/comparative analysis techniques and formulae
- Basic accounting principles and terminology. Basic public administration and organizational principles and terminology

Skill in:

- Performing financial, statistical, comparative analyses of budgetary documentation and data and making sound conclusions and recommendations
- Monitoring and reporting budget variances
- Performing accurate mathematical calculations
- Preparing clear, concise and complete reports and other written materials
- Developing, organizing and maintaining accurate records of budget correspondence and data
- Verifying the completeness and accuracy of budgetary information and data
- Exercising sound independent judgment within established guidelines
- Establishing and maintaining effective working relationships with those contacted in the course of the work

MINIMUM QUALIFICATIONS

Education

Possession of a Bachelor's degree from an accredited college or university in business administration, public administration, finance, accounting or a closely related field.

Experience

The equivalent of two (2) years of full-time professional level experience in budget administration and control.

Substitution

Additional experience in budget development and monitoring may be substituted for the education. Graduation from a four-year college is preferred.

WORKING CONDITIONS

Environmental Conditions

Office environment; exposure to computer screens.

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Physical Conditions

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

BART EEO-1 Job Group: 3500 - Professionals
Census Code: 0840 – Financial Analysts
Safety Sensitive: N

CLASSIFICATION HISTORY

Created : April 1988
Revised : February 2022