

# SANTA CLARA COUNTY OFFICE OF EDUCATION

## **CLASS TITLE: BUDGET OFFICER**

### **BASIC FUNCTION:**

Under the direction of the Director III Internal Business Services, plans, organizes, controls and directs the budget, account coding, and student attendance functions for the Santa Clara County Office of Education; serves as a resource to staff and managers regarding State and federal regulations related to accounting programs; supervises and evaluates the performance of assigned personnel.

### **REPRESENTATIVE DUTIES:**

#### **ESSENTIAL DUTIES:**

Plans, organizes, controls and directs the budget, account coding, and student attendance functions for the Santa Clara County Office of Education; researches, monitors, and recommends standards, procedures, and methods that have impact at departmental, and program management levels.

Prepares Board of Education transmittals for budget revisions; analyzes Gann limit calculations in collaboration with appropriate staff; prepares and assists with filing state revenue and budget reports; provides the Director III – Internal Business Services with financial status reports.

Provides analysis assistance for departmental and program management by researching and reporting on any financial questions; analyzes proposed legislation and adopted school finance laws to determine impact on programs; provides financial data and analyzes cost factors as needed.

Estimates revenues and expenditures, enrollment and average daily attendance; develops budget guidelines and instructions; trains program managers and staff in budget development, monitoring and account control; reviews and assesses impact of proposed budget revisions; reviews and provides recommendations for grant proposals and budgets within preset guidelines; and monitors and analyzes budgets on a continuing basis.

Directs and evaluates the performance of assigned staff; interviews and selects employees and recommends transfers, reassignments, terminations and disciplinary actions.

Guides budget development processes; assures compliance of budget and budget revisions to master criteria; initiates, analyzes, and reviews systems development efforts in budget, and the impact of accounting and payroll functions to budget; recommends new or revised standards and policies.

Plans, organizes and implements long and short-term programs and activities designed to enhance assigned budgets, accounting systems and programs; assures compliance with State Education Code budget and accounting requirements.

Provides technical expertise, information and assistance to the Director III- Internal Business Services regarding internal business services; formulates and develops policies, procedures and programs; recommends proper accounting structure for assigned programs and functions.

Prepares and maintains a variety of narrative and statistical reports, related to assigned activities.

Communicates with other managers, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange information; addresses program problems with program managers; documents problems and recommends resolutions.

Develops and prepares the annual preliminary budget for the Internal Business Services Department; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations.

Operates a computer and assigned software programs; operates other office equipment as assigned; drives a vehicle to conduct work as assigned.

Attends and conducts a variety of meetings as assigned.

**OTHER DUTIES:**

Performs related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

Planning, organization and management of budget development, account coding, budget reporting, enrollment and average daily attendance reporting  
Legislative process and how school laws are developed  
Educational budgeting and accounting  
Aspects of school and governmental finance  
Generally accepted accounting principles  
Statistical and analytical research  
Budget preparation and control  
Oral and written communication skills  
Principles and practices of administration, supervision and training  
Applicable laws, codes, regulations, policies and procedures  
Interpersonal skills using tact, patience and courtesy  
Operation of a computer and assigned software

**ABILITY TO:**

Plan, organize and direct the daily operations of the Budget office  
Interpret aspects of school law and applicable government and administrative codes  
Understand and interpret applicable laws, codes, court rulings, policies and regulations  
Serve as a resource to administrators regarding State and federal regulations  
Prepare State reports, audit and approve State and federal expenditure reports, and calculate revenues for State aid and Special Education entitlements

Prepare and update current and future budgets  
Supervise and evaluate the performance of assigned staff  
Communicate effectively both orally and in writing  
Interpret, apply and explain codes, rules, regulations, policies and procedures  
Establish and maintain cooperative and effective working relationships with others  
Operate a computer and assigned office equipment  
Analyze situations accurately and adopt an effective course of action  
Meet schedules and time lines  
Work independently with little direction  
Plan and organize work  
Prepare comprehensive narrative and statistical reports  
Direct the maintenance of a variety of reports and files related to assigned activities

**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 three years accounting experience in an educational organization including work with governmental budgetary and fiscal systems, models and procedures.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

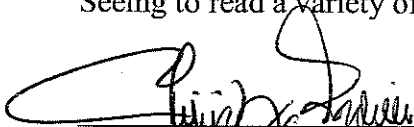
**WORKING CONDITIONS:**

**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.

  
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Philip J. Gordillo  
Executive Director of Human Resources

11/01/11  
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Date

Approved by Personnel Commission: 10/19/11