



## BUDGET ANALYST SENIOR BUDGET ANALYST

### **BASIC FUNCTION**

Under general direction, perform general-to-complex and sensitive analytical work related to preparing, reviewing, analyzing, evaluating and administering the District's budget; evaluate fiscal impact of budget submittals and related issues on departmental budgets and Districtwide budget; track and monitor budget expenditures, ensuring that allocated funds have been spent appropriately; develop a variety of financial scenarios and models, exploring and advising on multiple funding sources and alternative funding options.

### **REPRESENTATIVE DUTIES**

*The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.*

- Analyze, examine and/or lead designated staff in the examination of budget and allocation requests on the full scope of routine-to-complex budget issues for completeness, accuracy, and conformance with procedures, regulations, and policies; evaluate needs and priorities of assigned budgets to determine where funds may be reduced and where additional funds may need to be requested; examine alternatives available to continue funding programs, as appropriate. "E"
- Monitor budget allotment and reserve plans to assure compliance with District policies and objectives; monitor expenditures according to budget allocations/appropriations; recommend adjustments as needed. "E"
- Compile statistical, fiscal, and program information for the formulation and administration of budgets and budgetary allocations; provide training, work direction and guidance to designated staff as assigned. "E"
- Analyze resources, such as local bond, federal and state funds, review and develop financial forecasts and estimate future outcomes; develop and coordinates funding recommendations, justifications, alternatives for funding of agency programs and similar activities intended to meet current and evolving needs. "E"
- Develop a variety of routine-to-complex cost allocation plans and methodologies for assigned budgets. "E"
- Provide technical advice and assist District leadership in the preparation and monitoring of budgets, including the interpretation of budget policies; provide recommendations on budget and financial objectives. "E"
- Prepare, assemble, and/or lead designated staff in the preparation and assembly of fiscal and statistical data, charts, graphs, and reports for use in budgetary and program evaluations and budget hearings. "E"
- Prepare, review and analyze fiscal notes; work with department leadership to draft responses for budget proposals and recommendations. "E"
- Prepare reconciling documents for budget tracking purposes; code core budget reconciliation items and new decision items into the budgeting system. "E"
- Conduct analytical studies and fiscal investigations of complex and sensitive financial or organizational issues; prepare written and oral reports with recommendations for action. "E"
- Demonstrate a commitment to the Portland Public Schools Equity Initiative by developing a thorough knowledge and application of the district Racial Educational Equity Policy, Equity in Public Purchasing

and Contracting and other board policies; participate in staff development, in-services and trainings related to diversity, equity and inclusion in the workplace and in K – 12 education; model appropriate behaviors; develop, recommend and implement improvements to business practices with awareness and understanding of their impact in a racially and culturally diverse community. “E”

- Attend, participate in and/or lead meetings, workshops, seminars and in-services; represent the District in a variety of local community based organizations and coalitions to effect positive dialogue and relations in financial matters. “E”
- May provide leadership, training, work direction and guidance to designated staff; may supervise the performance of assigned staff, including interviewing, selecting, evaluating and training employees; recommend transfers, reassignment, termination and disciplinary actions, as appropriate.
- Perform related duties as assigned.

*Note: At the end of some of the duty statements there is an italicized “E”, which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.*

### **DISTINGUISHING CHARACTERISTICS OF THE CLASS**

The Budget Analyst and Senior Budget Analyst classifications both perform analytical work related to preparing, reviewing, analyzing, evaluating and administering the District’s budget and evaluate fiscal impact of budget submittals and related issues. Levels are differentiated by complexity of work assignments, scope of independence and discretion in decision-making and levels of proficiency in both knowledge and expertise.

The Budget Analyst performs standard, routine budget analysis and monitoring over a variety of multiple limited-scale programs or single department, large-scale budget activities. Employees in this classification may be assigned at the District department-level, or support the Budget group within the Fiscal Services Department of the District.

Employees in the Senior Budget Analyst classification are typically assigned to the District Finance Department, performing the more advanced, complex analysis and monitoring of the aggregate of the District’s large scale, multiple departments’ budgets and may assist, train, oversee, lead or directly supervise Budget Analysts in the performance of their duties. Employees at this level play a significant role as a consultant to departments and Budget Analysts in budget administration.

### **EMPLOYMENT STANDARDS**

#### Knowledge of:

Principles, practices, tools and techniques of budget and financial analysis and project management  
Principles and practices of governmental accounting and research methods applicable to the budget process.  
Budgetary and fiscal systems software used in developing and monitoring District budgets.  
Principles, theories and practical application of public agency budgeting.  
District organization, operations, policies and objectives.  
Techniques and principles of high-quality customer service.  
Internal consulting concepts and practices.  
Current technologies, statistical, financial, budgeting, spreadsheet, word processing and presentation software.  
Effective written and oral communication and presentation techniques.  
Current local, state and federal budget and finance issues related to governmental agencies and K–12 public education.

#### Ability to:

Oversee, prepare, analyze and monitor assigned budgets.  
Analyze budget data utilizing a variety of routine-to- complex processes.  
Prepare and interpret complex financial reports and statements.  
Comprehend assigned programs’ goals, objectives, and operations and relate these to budget and program analysis.  
Organize and present clear and concise reports of findings and recommendations related to assigned activities.

Understand, interpret, apply and explain complex laws, rules, regulations related to governmental budgeting.  
Provide internal consultation services.  
Adapt to changing work priorities while meeting timelines and deadlines.  
Model ethical behavior and communicate high expectations of ethical behavior to others.  
Maintain confidentiality of highly sensitive information.  
Act judiciously under pressure.  
Communicate effectively both orally and in writing.  
Operate a variety of office machines, technologies and software.

**Education, Training and Experience:**

The Budget Analyst requires a Bachelor’s degree in Finance, Accounting, Business Administration, Economics, Statistics, Public Administration, or related field *and* three (3) years of experience monitoring, developing, analyzing and overseeing budgets in a full-service public agency. Budget and/or Financial Analyst certifications through GFOA, NASBO, AABPA, and experience working in a richly diverse school community and environment are highly desirable.

The Senior Budget Analyst requires a Bachelor’s degree in Finance, Accounting, Business Administration, Economics, Statistics, Public Administration, or related field *and* five (5) years of experience monitoring, developing, analyzing and overseeing multiple departments, highly complex budgets in a full-service public agency *or* two (2) years of experience as a Budget Analyst with Portland Public Schools. Lead or supervisory experience, Budget and/or Financial Analyst certifications through GFOA, NASBO, AABPA, and experience working in a richly diverse school community and environment are preferred.

A Master’s degree in one of the above-identified fields may substitute for two years of the required experience for both the Senior and Budget Analyst levels.

Any other combination of training and experience which demonstrates the applicant is likely to possess the required skills, knowledge and abilities may be considered.

**WORKING CONDITIONS**

*The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.*

**Work Environment:** Work is performed primarily in an office environment.

**Hazards:** Potential conflict situations.

**Physical Demands:** Primary functions require sufficient physical ability and mobility to work in an office; dexterity of hands and fingers to operate a computer keyboard and other technologies and office equipment; sitting, standing and walking for extended periods of time; kneeling, bending at the waist; lifting, pushing, pulling and carrying equipment, supplies and materials weighing up to 25 pounds; repetitive hand movement and fine coordination to use a computer keyboard; emotional stability to work effectively under pressure and to keep all aspects of the job under control; hearing and speaking to exchange information in person or on the telephone; seeing to read, prepare and assure the accuracy of documents.

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FLSA: Exempt  
Bargaining Unit: N/A  
Salary Grade: BA -25; Senior BA -34

Approval Date: December 6, 2016

*Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.*  
Board of Education Policy 1.80.020-P