

BUDGET ANALYST SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date	Last Action
4739	Budget Analyst	02	350	6 mo.	05/01/22	Revised/CIT
4741	Senior Budget Analyst	01	350	12 mo.	05/01/22	Revised/CIT
4728	University Budget Officer	01	593	12 mo.	05/01/22	Revised/CIT

Promotional Line: 315

Series Narrative

Employees in this series participate in the development, preparation, execution, and/or management of a budget(s) within an institution or agency.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Budget Analyst

4739

Employees at this level of the series provide support in the development and/or execution of a budget(s). A(n) Budget Analyst serves a dual role as a liaison and technical expert in ensuring conformance to established policies and procedures. They work under the general supervision of a designated supervisor(s).

A(n) Budget Analyst typically –

1. serves as the primary contact for a budget portfolio(s); provides technical assistance in the preparation and execution of budget(s);
2. interprets fiscal management policies, procedures, and/or requirements;
3. assists in developing, preparing, examining, and/or reconciling budget proposals, projections, and/or reports;
4. reviews, reconciles, and processes budget transactions in conformance with applicable laws, regulations, or institutional policies;
5. updates and maintains budget information within a financial management system;
6. compiles and analyzes data; develops summaries or visual aids of financial information for reporting purposes;

7. prepares and conducts training for fiscal management policies, procedures, and/or requirements;
8. monitors, researches, and/or distributes information regarding changes in policies, procedures, and/or requirements;
9. performs other related duties as assigned.

Level II: Senior Budget Analyst**4741**

Employees at this level of the series provide oversight in the development and/or execution of a budget(s). They work under the direction of a designated supervisor(s).

A(n) Senior Budget Analyst typically -

1. directs activities relative to the management of budget portfolio(s); ensures compliance with fiscal management policies, procedures, and/or requirements;
2. serves as a technical and/or administrative resource; participates in various meetings, conferences, and/or on committees;
3. advises on fiscal management policies, procedures, and/or requirements;
4. coordinates the preparation, development, and completion of budget proposals, projections, and/or reports;
5. certifies budgets transactions in conformance with applicable laws, regulations, or institutional policies;
6. conducts analyses and makes recommendations; prepares statements requiring interpretation and/or analysis of financial information;
7. directs personnel functions such as training, supervising, evaluating performance, and/or developing staff, work schedules, and assignments;
8. participates in the development and implementation of policies, procedures, and initiatives;
9. performs duties of the lower level;
10. performs other related duties as assigned.

Level III: University Budget Officer**4728**

Employees at this level of the series serve as institution(s) representatives in budgetary matters. They work under the direction of a designated administrator(s).

1. oversees activities relative to the management of a budget(s);
2. acts as an institution(s) representative in budgetary matters; represents the department(s) in various meetings, conferences, and/or on committees;
3. contributes to the development and implementation of programs, objectives, and/or long-range planning;
4. oversees the preparation and/or development of budget proposals, projections, and/or reports;
5. oversees the evaluation, development, and implementation of operational policies and procedures;
6. oversees personnel functions such as training, supervising, evaluating performance, and/or developing staff, work schedules, and assignments;
7. performs duties of the lower level;
8. performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS

Level I: Budget Analyst**4739**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school diploma or equivalent.
2. Any one or combination totaling **three (3) years (36 months)** from the categories below:
 - A. course work in accounting, business administration, finance, statistics, or a closely related field, as measured by the following conversion table or its proportional equivalent:
 - 30 semester hours equals **one (1) year (12 months)**

- Associate's Degree (60 semester hours) equals **eighteen months (18 months)**
- 90 semester hours equals **two (2) years (24 months)**
- Bachelor's Degree (120 semester hours) equals **three (3) years (36 months)**

B. work experience in budgeting, financial management, or closely related experience.

KNOWLEDGE, SKILLS, AND ABILITIES (KSAS)

1. Knowledge of the economic and accounting principles and practices, financial markets, banking, and the analysis and reporting of financial data.
2. Knowledge of electronic equipment, computer hardware, software, and their applications.
3. Knowledge of arithmetic, algebra, statistics, and their applications.
4. Ability to exhibit strong organizational skills and maintain detailed, accurate records.
5. Ability to communicate effectively for the needs of the audience.
6. Ability to process and handle confidential information with discretion.
7. Ability to use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
8. Ability to identify measures or indicators of system performance and the actions needed to improve or correct performance relative to the goals of the system.
9. Ability to work independently and effectively organize and prioritize multiple tasks.
10. Ability to interpret work-related documents, policies, and procedures.

Level II: Senior Budget Analyst

4741

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Bachelor's Degree in accounting, business administration, finance, statistics, or a closely related field.
2. **Three (3) years (36 months)** of budget or financial management-related work experience.

NOTE: A Master's Degree in the areas listed may be substituted for one (1) year (12 months) of professional work experience.

KNOWLEDGE, SKILLS, AND ABILITIES (KSAS)

1. Knowledge of economic and accounting principles and practices, financial markets, banking, and the analysis and reporting of financial data.
2. Knowledge of electronic equipment, computer hardware, software, and their applications.
3. Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
4. Knowledge of arithmetic, algebra, statistics, and their applications.
5. Ability to interpret work-related documents, policies, and procedures to convey relevant information clearly.
6. Ability to use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
7. Ability to exhibit strong organizational skills and maintain detailed, accurate records.
8. Ability to identify measures or indicators of system performance and the actions needed to improve or correct performance relative to the goals of the system.
9. Ability to work independently and effectively organize and prioritize multiple tasks.

Level III: University Budget Officer

4728

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Bachelor's Degree in accounting, business administration, finance, statistics, or a closely related field.
2. **Five (5) years (60 months)** of budget or financial management-related work experience at a supervisory or administrative level.

NOTE: A Master's Degree in the areas listed may be substituted for one (1) year (12 months) of professional work experience.

KNOWLEDGE, SKILLS, AND ABILITIES (KSAS)

1. Knowledge of economic and accounting principles and practices, the financial markets, banking, and the analysis and reporting of financial data.
2. Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership techniques, production methods, and coordination of people and resources.
3. Knowledge of electronic equipment, computer hardware, software, and their applications.
4. Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
5. Knowledge of arithmetic, algebra, statistics, and their applications.
6. Ability to interpret work-related documents, policies, and procedures and convey relevant information clearly.
7. Ability to use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
8. Ability to exhibit strong organizational skills and maintain detailed, accurate records.
9. Ability to identify measures or indicators of system performance and the actions needed to improve or correct performance relative to the goals of the system.
10. Ability to work independently and effectively organize and prioritize multiple tasks.