



Orange County Department of Education
Human Resources Department
Classified Management Class Specification

Budget and Grants Support Analyst

Class Code: 1691

Work Days: 225

GENERAL PURPOSE

Provide specialized budget, grant, and fiscal analysis services in support of the Orange County Department of Education (OCDE) programs; perform specialized accounting and fiscal functions; and provide assistance to higher level management staff.

SUPERVISION RECEIVED AND EXERCISED

1. Receives direction from higher level management staff.
2. May exercise direct supervision over technical and clerical staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

1. Assist in the development and maintenance of budget procedures and operational processes; analyze fiscal data and provide recommendations to support departmental goals and objectives.
2. Provide staff assistance to higher level management staff on a variety of projects; research issues; compile and analyze data; develop reports; respond to requests for information; and make recommendations.
3. Analyze funding requirements and provide fiscal guidance to program staff in the development of grant applications, including budget preparation, supporting documentation, and compliance with funding guidelines.
4. Develop single-year and multi-year budget projections for categorical and grant-funded programs; prepare budget-related application materials and supporting fiscal documentation required by funding agencies.
5. Review grant agreements, contracts, and budget proposals for fiscal accuracy, compliance with funding requirements, and consistency with OCDE fiscal policies; provide technical assistance regarding fiscal requirements and budget-related inquiries.
6. Prepare tentative, interim, and final budgets within established guidelines for grants and entitlements; review expenditures for special programs to ensure proper budget compliance.
7. Serve as a liaison between internal and external stakeholders regarding budget and grant requirements; analyze fiscal impacts and recommend procedural improvements as funding requirements change.
8. Prepare preliminary, tentative, interim, and final budget submissions for the state within established

guidelines and review expenditures for programs to ensure proper budget compliance.

9. Develop budgets for individual funds and cost centers; estimate income for cost centers and programs using tax reports, certifications, estimates, and negotiations; and recommend improvements to the budget system as needed.
10. Project cash flow for determining budget transfer needs; review and process budget transfers; and add, change, or delete cost centers and individual accounts as needed.
11. Provide technical assistance and training to staff regarding budget development, grant compliance, and fiscal reporting requirements.
12. Review accounts and programs to ensure compatibility with state school accounting requirements and ensure all transactions follow the requirements and the designated categorical requirements.
13. Assist with annual audits by preparing fiscal documentation, responding to auditor requests, and reviewing records for compliance and accuracy.
14. Prepare, analyze, forecast, and monitor revenue and expenditures for specialized programs.
15. Prepare various financial reports of programs for OCDE executive cabinet review.
16. Interpret legislation and make recommendations to higher level management staff.
17. Work with all levels of OCDE staff to provide technical assistance and explain budget processes and requirements.
18. Participate in county, regional, and state meetings related to budgeting, grants, and fiscal compliance.
19. Maintain records pertaining to programs and activities and compile reports and statistical information.
20. Demonstrate attendance sufficient to complete the duties of the position as required.
21. Perform related duties similar to the above in scope and function as required.

QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)

Knowledge of:

1. Principles and practices of complex finance administration in accounting, budgeting, and auditing.
2. Governmental Accounting Standards Board (GASB) and Generally Accepted Accounting Principles (GAAP).
3. Complex operations, services, and activities of a budgetary program.
4. Principles, practices, and procedures related to governmental budgeting, grant administration, and fiscal reporting.
5. Procedures, methods, and techniques of project and workflow management and organization.
6. Pertinent federal, state, and local laws, education codes, regulations, and standards/principles.

Ability and Skill to:

1. Provide technical guidance and training regarding budget development, grant compliance, and fiscal reporting processes.
2. Support departmental goals through fiscal analysis, budget development, and implementation of assigned projects and initiatives.

-
3. Effectively adapt and adjust program services to meet changing priorities and customer-specific needs.
 4. Translate financial goals into an appropriate budgeting system.
 5. Analyze financial information and project income and expenditures.
 6. Project the fiscal impact of impending legislation on the OCDE or its programs.
 7. Devise and adapt procedures and systems to meet changing fiscal needs.
 8. Establish and maintain effective working relationships with various constituencies.
 9. Interpret and explain laws, codes, contracts, policies, and procedures.
 10. Develop and present training materials.
 11. Analyze fiscal processes and procedures and recommend improvements to increase efficiency, compliance, and effectiveness.
 12. Prepare clear and concise correspondence, reports, and other written materials.
 13. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
 14. Communicate clearly and concisely, both orally and in writing, in English; and present information effectively in front of both large and small groups.

Education, Training, and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is a bachelor's degree in accounting, finance, business, public administration, or a related field and four (4) years of experience in budgeting, grant administration, fiscal analysis, accounting, financial reporting, or fiscal compliance; or an equivalent combination of training and experience.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class.

Physical Demands

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification must be able to travel countywide to a variety of sites within a reasonable time frame, read written and electronic materials, and communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); perform deskwork for extended periods; and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces and move items weighing up to 25 pounds.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet

productivity requirements; and interact successfully with various groups of people encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

Employee typically works in an office environment that is fast-paced with high pressure.