

## Draft Classification Standards – Rev. 03/29/2024

### Budget Analyst Series

Class Title	Class Code	Issue Date	FLSA
<i>Budget Analyst I</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Budget Analyst II</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Budget Analyst III</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Budget Analyst IV</i>	XXXX	XXXX	<i>Exempt*</i>

#### OVERVIEW:

Positions classified within the Budget Analyst series are directly responsible for providing budget analysis work required to administer the CSU budgetary program and provide consultative budget services to an assigned area. Responsibilities may include, but are not limited to, budget development, budget administration, managing cashflows, and making projections.

Positions are assigned to classifications within the series based on the scope and complexity of budget analyst activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include, but are not limited to, completing budget analysis, reviewing and processing budget requests, completing financial data analysis, developing and reviewing budget models, monitoring budget performance, conducting feasibility studies for new initiatives, preparing and reviewing budget proposals, and developing budget process documentation, communications, and training. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels.

***Budget Analyst I*** – Entry-level professional who applies basic professional budgeting concepts to resolve problems of limited technical scope and complexity; normally operates under detailed guidelines and work is often reviewed for accuracy. Assignments may be routine in nature and involve performing various duties related to delivering specialized budget analysis services. Conducts analysis of alternative options and situations or data from which answers can be readily obtained.

***Budget Analyst II*** – Professional who applies acquired job skills, and knowledge of budgeting policies, processes, and procedures to complete significant assignments, projects, and tasks of moderate technical scope and complexity. Draws from prior experience and knowledge of budgeting concepts to exercise judgment while performing budget analysis work required to administer the CSU budgetary program and assist in providing consultative budget service to campus constituents. Provides input for new programs and procedures. Works with stakeholders to resolve issues and discrepancies.

***Budget Analyst III*** – Professional who applies advanced budgeting job skills, detailed knowledge of budgeting policies and procedures; project management skills, and organizational and stakeholder acumen, to complete substantive assignments, projects, and related work of significant technical scope and complexity. Exercises advanced

\* This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee's actual exemption status may differ based on salary rate and actual duties performed.

discernment and in-depth knowledge of budgeting best practices, university guidelines, and standard operating procedures to perform complex budget analysis work and provide consultation and training to campus constituents. May require the development of new approaches, techniques, and innovation to address issues. Works with stakeholders to ensure proper implementation of programs by utilizing persuasion.

**Budget Analyst IV** – Technical leader with expert knowledge in professional budget work. Problem-solving frequently requires analysis of unique issues or problems without precedent and/or structure as well as new approaches, methods, techniques, or innovation. In collaboration with management develops, implements, and maintains policies and processes.

**TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (*May include but are not limited to*):**

- *Budgeting and Financial Planning Processes* – Analyzes budget requests and performs ongoing budgetary control of revenue and appropriations. Reviews balance sheet items in evaluating financial resources available and impact on a budgetary program. Prepares monthly and year-end closing journal entries, including systemwide transactions. Manages fund balances, cash flows, enterprise fund budgeting and reconciliations.
- *Financial Data Analysis* – Analyzes financial data, historical trends, and performance metrics to forecast revenue, expenses, and resource allocation for multiple departments and programs. Monitors and analyzes budget performance, identifying and addressing budgetary issues, discrepancies, and opportunities for cost savings or revenue enhancement. Conducts financial analyses and feasibility studies for new initiatives, capital projects, and program expansions while assessing financial viability and potential risks.
- *Budget Models, Policies, and Training* – Develops and maintains budget models, tools, and templates to facilitate accurate and efficient budget preparation, monitoring, and reporting. Performs cash flow modeling. Develops and/or updates budget policies, procedures, and processes. Develops training and tools to guide university stakeholders through budget processes.
- *Budget Proposals* – Prepares and presents budget proposals, financial reports, and variance analyses to senior management, providing insights and recommendations to support decision-making.

**BUDGET ANALYST I**

Under direct supervision, performs entry-level professional duties by utilizing basic budgeting and accounting principles and concepts. Assists more advanced Budget Analysts. Performs less complex assignments following detailed and established procedures in support of budgeting initiatives and processes. Work is regularly reviewed for understanding of professional concepts and compliance with policies and procedures.

**Work assignments typically include some or all of the following:**

- ◆ Surveys and investigates budget matters, including collecting systemwide and campus-level information or other applicable sources.
- ◆ Conducts basic analysis to support the review of budget requests, including projection and revenue costs, posting of budget data to journals, registers, or ledgers, and performs ongoing budgetary control of appropriations.
- ◆ Gathers data and conducts studies on various problems arising in connection with budget administration.
- ◆ Prepares information concerning specific phases of less complex budgets and financial procedures.
- ◆ Documents budget processes and updates websites and training materials.
- ◆ Contributes to budget summary reports by completing financial analysis.
- ◆ Utilizes integrated financial systems and/or other types of records management systems.
- ◆ Provides initial troubleshooting of financial systems problems.
- ◆ Provides customer service to internal and external stakeholders, resolving issues in a professional and timely manner.

**MINIMUM QUALIFICATIONS:**

***Knowledge and Skill:***

- ◆ General knowledge of budgeting principles, concepts, and processes.
- ◆ Skill in following guidelines and providing input and feedback.
- ◆ Demonstrated communication and interpersonal skills.
- Analytical and problem-solving skills including the ability to analyze and summarize mathematical and statistical information.
- Ability to work independently and as part of a team and build relationships with diverse stakeholders.
- ◆ Proficiency in using financial systems as well as word processing and spreadsheet software and applications.
- ◆ Organizational and time management skills to plan, organize, and prioritize work.
- ◆ Strong attention to detail and accuracy.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field. Relevant education and/or experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis.

**BUDGET ANALYST II**

Under general supervision, develops and administers campus budgets for specific functions or departments. Responsibilities cover most technical aspects of budgeting and related projects. Collaborates with various stakeholders to ensure proper budget development and administration. Works independently on most day-to-day assignments with general supervision on new assignments or projects to ensure alignment with objectives. Handles multiple work priorities and is accountable for own work results.

***In addition to duties performed by the Budget Analyst I, the Budget Analyst II typically performs the following duties:***

- ◆ Consults with and advises stakeholders on fiscal organization, fiscal procedures, and related problems.
- ◆ Prepares materials to summarize, analyze, and justify budget programs.

- ◆ Assists management with position control, labor cost distribution, and budgetary control functions.
- ◆ Provides information and instruction to management and employees concerning specific phases of budgets and financial procedures.
- ◆ Prepares budget-related reports and correspondence.
- ◆ Reviews, revises, and develops budgeting policies, processes, and guidelines.
- ◆ Participates in the design and installation of financial systems upgrades as well as required testing and verification of results.
- ◆ Conducts extensive financial data compilation, querying, and drilling on large volumes of financial data.

**MINIMUM QUALIFICATIONS:**

***In addition to Budget Analyst I knowledge and skill requirements, work assignments typically require:***

- ◆ Working knowledge of financial, budgetary, and accounting principles and practices.
- ◆ Working knowledge of the principles and practices of public finance, administrative, personnel fiscal management, and cash-flow management.
- ◆ Working knowledge of research techniques and statistical principles and procedures.
- ◆ General knowledge of the principles of position control and budgetary alignment.
- ◆ Advanced proficiency in using financial system, word processing and spreadsheet software and applications.
- ◆ Strong analytical skills in order to evaluate and interpret data to develop sound conclusions and recommendations.
- ◆ Ability to define problem areas, collect data, perform preliminary analyses, make appropriate recommendations, and prepare clear and concise analytical comments.
- ◆ Strong communication and interpersonal skills to effectively present information and ideas and advise managers, staff, and faculty regarding budgeting policies and procedures.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field and two years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

**BUDGET ANALYST III**

Working independently under general supervision, performs advanced budget analysis work by exercising lead oversight for most projects and responsibilities. Applies advanced knowledge or expertise to recommend and implement strategic plans and initiatives. Demonstrates advanced discernment in selecting methods and techniques for obtaining solutions. In collaboration with management, oversees, assesses, formulates, and evaluates programs, policies, and procedures. Decision-making is based on budget analysis best practices; relevant regulations; advanced experience; and university goals and practices. Work is focused on ensuring alignment with overall objectives. Handles multiple work priorities and may provide lead work direction with accountability for results.

***In addition to duties performed by the Budget Analyst II, the Budget Analyst III typically performs the following duties:***

- ◆ Independently surveys and investigates more complex budget matters, including collecting information from state databases, other institutions of higher education, and other sources as warranted,
- ◆ Consults with and advises responsible campus officials on budget requests, including projection and revenue costs, posting of budget data to journals, registers, or ledgers and performs ongoing budgetary control of appropriations.
- ◆ Analyzes position control, labor cost distribution, and budgetary control functions.
- ◆ Develops business processes, standards, and procedures,
- ◆ Conducts in-depth troubleshooting of financial systems problems.
- ◆ Provides input to the design and installation of financial systems upgrades, conducts the required testing, and verifies results.
- ◆ May be assigned responsibility for providing training, guidance, and assistance to other employees and may provide lead work direction to other professional and/or technical staff.

**MINIMUM QUALIFICATIONS:**

***In addition to Budget Analyst II knowledge and skill requirements, work assignments typically require:***

- ◆ Advanced knowledge of financial, budgetary, and accounting principles and practices.
- ◆ Thorough knowledge of the purpose, functions, and fiscal organization of the campus(es).
- ◆ Thorough knowledge of the principles of position control and budgetary alignment.
- ◆ Advanced knowledge of the principles and practices of public finance, administrative personnel, fiscal management, and cash-flow management.
- ◆ Advanced knowledge of research techniques and statistical principles and procedures.
- ◆ Knowledge of or ability to quickly learn the financial structure and financial procedures of the university.
- ◆ Ability to analyze and review the campus budgets and financial practices, and present complex budget information in a clear, concise, and professional manner, analyze situations accurately, and develop an effective course of action.
- ◆ Advanced analytical skills in order to evaluate and interpret data to develop sound conclusions and recommendations.
- ◆ Advanced communication and interpersonal skills to effectively present information and ideas and advise managers, staff, and faculty regarding budgeting policies and procedures.
- ◆ Advanced skill in mentoring or overseeing the work of others.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

**BUDGET ANALYST IV**

Working independently with minimal supervision, performs highly complex Budget Analyst work that requires expert knowledge of budgeting principles, practices, and concepts. Provides expert advice and guidance across the university to students, faculty, staff, and leaders on the implementation of the university budget processes. Problems are highly complex, and solutions

may require the creation of new and unprecedented procedures. Serves as a technical expert and collaborates with management in the development and implementation of new programs, policies, and practices. Decision-making often requires integration and interpretation of relevant regulations, organizational policy, budgeting best practices, financial and organization impact of programs. Functions with a high degree of autonomy. Work often requires a high degree of persuasion and leadership.

***In addition to duties performed by the Budget Analyst III, the Budget Analyst IV typically performs the following duties:***

- ◆ Responsible for strategic recommendations having broad campus and often systemwide impact. Performs work that supports short- and long-term goals and objectives.
- ◆ Leads strategic projects of significant scope and impact on the university and people operations.
- ◆ Provides lead work direction to other professionals.
- ◆ Serves as a key technical advisor to management.
- ◆ Provides oversight and recommendations for complex problems and issues.
- ◆ Leads process improvement efforts, often developing new approaches and solutions.
- ◆ Addresses problems from a broad interactive perspective using advanced research and analytical skills to conceive new solutions.
- ◆ Collaborates with management to develop key messages and talking points for budget process activities.

**MINIMUM QUALIFICATIONS:**

***In addition to Budget Analyst III knowledge and skill requirements, work assignments typically require:***

- ◆ Expert knowledge and understanding of budgeting principles and concepts within a public sector organization.
- ◆ Expert knowledge and skill in applying and interpreting applicable standards and guidelines, as well as providing recommendations on organizational policy as appropriate.
- ◆ Expert analytical and organizational skills to organize, prioritize, and manage the successful completion of large, complex, and strategic projects.
- ◆ Expert communication and interpersonal skills to effectively collaborate with internal stakeholders, budget, and financial management, and represent the university to external entities.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field and five years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.