

**Job Title:**                    **Coordinator – Budget Analysis and Reporting**



## **Position Description**

*To perform this job successfully, an individual must be able to perform the essential job functions consistently and to the satisfaction of the employer. Reasonable accommodations may be made for qualified disabled individuals. This job description is not an exhaustive list, as employees may be required to perform duties not specifically designated within this document, at the employer's discretion. The Escambia County School District reserves the right to modify or interpret this job description as needed.*

**FLSA Status:**            Exempt  
**Reports to:**            Appropriate Supervisor or Designee  
**Supervises:**           Appropriate Staff as required  
**Pay Grade:**            Professional – 4

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ESCAMBIA COUNTY SCHOOL BOARD  
**APR 20 2021**  
DR. TIMOTHY A. SMITH, SUPERINTENDENT  
VERIFIED BY RECORDING SECRETARY

## **JOB SUMMARY**

The purpose of this position is to ensure the accurate and timely reporting of the District's budget and full-time equivalent (FTE) projections, to coordinate the preparation of the District Annual Cost Report, to prepare various state reporting and compliance documents, to prepare monthly budget amendments, and to support the development and coordination of general, federal, capital outlay, and debt service budgets.

## **ESSENTIAL JOB FUNCTIONS**

- Assists with the preparation and reporting of the District budget.
- Coordinates the annual state required FTE survey processes between school level, District level, and Department of Education personnel.
- Performs the charter school financial statements analyses, quarterly reports, and revenue recalculation.
- Meets with school principals prior to each survey period, audits school-level documentation, and continues coordination through the editing and correction cycle.
- Prepares the District Annual Cost Report, the Title I Comparability Report, and the District School Financial Report as required.
- Coordinates all cost report activities with appropriate accountants.
- Prepares District FTE projections and budget to be submitted to the Department of Education.
- Meets with program directors to provide preliminary projections, historical analyses, and other tools required for final projection package.
- Interprets statutes, rules, and regulations as required.
- Completes special assignments such as trend analyses, cost analyses, and historical reports as assigned.
- Develops trend analyses and cost analyses to assist in making financial and other management plans and decisions.
- Assists in the interpretation of programs, philosophy and policies of the District to staff, students, and the community.
- Interacts with parents, outside agencies, businesses, and the community to enhance understanding of District initiatives and priorities and to elicit support and assistance.

- Serves as liaison with the Florida Department of Education for assigned areas of responsibility.
- Consults with the Department of Education and other appropriate federal, state, and local agencies on interpretation of laws, rules, and policies.
- Provides technical assistance to those assigned or by request.
- Responds to inquiries pertaining to policy, procedure, record keeping, reporting, and internal controls. Keeps supervisor informed of potential problems or unusual events.
- Develops annual goals and objectives consistent with and in support of District goals and priorities.
- Attends training sessions, conferences, and workshops to keep abreast of current practices, programs, and legal issues.
- Supervises assigned personnel, conducts annual performance appraisals, and makes recommendations for appropriate employment action.
- Prepares or oversees the preparation of all required reports and maintain appropriate records.
- Serves on District, state, or community councils or committees as assigned or appropriate.
- Exercises proactive leadership in promoting the vision and mission of the District.
- Provides oversight and direction for cooperative planning with other agencies.
- Facilitates problem solving by individual or groups.
- Performs other duties as assigned.

#### **MINIMUM REQUIREMENTS**

- Master's Degree from an accredited educational institution in Business Administration, Accounting, or Accounting Information Systems.
- Minimum of five (5) years of experience in school district budgeting and accounting with progressive experience in management and supervision.
- Certified Public Accountant (CPA) preferred.
- Qualifications may vary from the above requirements to such a degree as the Superintendent and Board determine is necessary and appropriate to ensure properly qualified personnel in each specialized assignment.

#### **KNOWLEDGE, SKILLS, AND ABILITIES**

- Requires the ability to demonstrate knowledge of generally accepted accounting principles, federal and state laws and administrative policies governing school financial practices and procedures.
- Requires the ability to demonstrate knowledge of principles of management and supervision.
- Requires the ability to demonstrate knowledge of principles and practices of activity-based cost accounting.
- Requires the ability to evaluate accounting and financial procedures and design and initiate new methods, reports, and practices.
- Requires the ability to prepare complete and accurate reports and statements of considerable complexity.
- Requires the ability to demonstrate knowledge of automated financial accounting systems, word processing, spreadsheet, database, presentation, and other software tools.
- Requires the ability to read, analyze, and interpret financial reports.

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- Requires the ability to display possession of a high degree of mathematical and analytical skill.
- Requires the ability to plan and organize effectively and present information in a concise, understandable manner to large groups.
- Requires the ability to display possession of a high degree of oral and written communication skills and interpersonal skills.
- Requires the ability to handle and prioritize multiple tasks.
- Requires the ability to establish and maintain effective working relations with department heads, school principals, and staff.
- Requires the ability to determine the approach for doing the work based on provided guidelines.
- Requires the ability to perform professional-level work dealing with data, people, and technology that relates to administrative, technical, scientific, engineering, accounting, legal, or managerial skills.
- Requires the ability to work in a responsive environment where co-workers or citizens bring problems for resolution
- Requires the ability to use computers for word processing and/or accounting purposes.

**PHYSICAL DEMANDS**

Light Work: Exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force as needed to move objects. The work also requires the following physical abilities in order to perform the essential job functions: fingering, hearing, mental acuity, speaking, and visual acuity.

**WORKING CONDITIONS**

Employees in this position work in a safe and secure work environment that may periodically have unpredicted requirements or demands.

**Date of Board Approval: June 20, 2017, effective July 1, 2017**

**Date of Revision: April 20, 2021, effective July 1, 2021**

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