

DESCRIPTION: Under general supervision; performs procedural and technical level budget and fiscal work in the development, coordination, consolidation, and execution of the agency budget; performs related work as assigned.

DISTINGUISHING CHARACTERISTICS: (A position is assigned to this class based on the scope and level of work performed as outlined below.)

This is the first level in a series of three. The work performed by this class is primarily procedural and technical in nature and involves the application of specific instructions/guides in compiling fiscal and accounting data, maintaining records, preparing charts and reports, conducting studies and reviewing/evaluating requests for operating and capital improvement funds. It requires a basic understanding of budgeting processes and procedures and a detailed knowledge of existing budget systems and budgeting policies/procedures and requirements and the ability to apply specific budgeting techniques. This position does not make budget decisions, rather, provides the data and recommendations to management who makes the decisions.

Although the Budget Officer II does some technical work, they are more involved in the planning, preparation, evaluation and analysis of budget requests/proposals. The Budget Officer III level receives only general direction in budget preparation and is working within large agencies having complex and varied programs that spend significant dollars for purposes other than salaries and administrative support. The Budget Officer III is often directing others in the preparation of the budget.

The Budget Officer series is distinguished from the Budget Analyst class in that they are focused more on the development, monitoring and tracking of budget expenditures. The Budget Analyst class is more focused on the analysis of the budget/finances with a long term perspective and impacts of changes/reductions in the budget. Budget Analysts have little involvement in the day-to-day administration of the budget. The Budget Analyst is found in large agencies with multiple complex programs and each is assigned a large component of a very large budget (\$100s of millions). Budget Analysts also report to an Accounting & Finance Manager or similar level within an agency.

The Agency Budget Management Analyst class is found in a large agency with a very large budget having multiple facilities in multiple geographical locations and is independently responsible for the development, control and analysis of the agency-wide budget, fiscal controls and reporting systems. Incumbent directs the facility/division Budget Officers in the development of their budgets and resolves problems. This class is the highest level budget management position in the agency and reports to a deputy director or director.

The Budget Management Analyst class series positions are responsible to manage the budget for the state as a whole (all three branches of state government) vs. an agency or division level budget and are used only by the State Budget Office.

EXAMPLES OF WORK: (A position may not be assigned all the duties listed, nor do the listed examples include all the duties that may be assigned.)

Compiles fiscal and accounting data to use in budget evaluations, cost analyses, and budget projections.

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Monitors expenditures to ensure proper controls are maintained in accordance with established regulations and policies.

Audits financial statements and reports to verify calculations and identify discrepancies.

Recommends/suggests budget proposals for the organization to assist management in planning and administering funds.

Consults with and advises management on budget matters to exchange information, to identify the characteristics and impact of budget problems, and to formulate possible solutions.

Writes and disseminates instructions, manuals, and procedures relating to budgeting and reporting to facilitate employee production.

Surveys and studies agency budgeting systems and agency needs to develop plans to modify existing systems or design and install new systems that will more effectively meet agency goals and objectives.

Sorts, files, and/or retrieves correspondence, records, reports, computer printouts, and other documents to ensure uniform storage and ready access to information.

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED: (These are needed to perform the work assigned.)

Knowledge of: budgeting, theory, procedures, and practices; record keeping practices, accounting principles and practices; organizational structure, functions, goals, policies, and procedures; state budgeting cycle and procedures.

Ability to: communicate effectively to exchange information; compute and compile data involving the use of addition, subtraction, multiplication, division, percentages and fractions; apply the principles, theories, and concepts of budgeting to a specific financial management system; examine documents for completeness, accuracy, and conformance with specific requirements; analyze agency operations and data to recommend efficient and economical operating methods; interact with supervisors and employees to gain their cooperation and to establish working relationships.

MINIMUM QUALIFICATIONS: (Applicants will be screened for possession of these qualifications. Applicants who need assistance in the selection process should request this in advance.)

Experience in performing budgeting, auditing, accounting, or clerical/technical accounting functions.

OR

Post high school coursework/training in budgeting, auditing, accounting, finance, business or public administration.

SPECIAL NOTE:

State agencies are responsible to evaluate each of their positions to determine the individual overtime eligibility status as required by the Fair Labor Standards Act (FLSA).