

**DESCRIPTION:** Under administrative direction, plans, organizes, directs and controls the agency or large component of the agency's budget, fiscal control, and fiscal reporting systems; 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 second level in the Budget Officer series of three. This class does some work that is procedural/ technical in nature but primarily involves program planning and analysis activities such as developing, implementing and interpreting budgeting policies/procedures, advising management, identifying and solving budget problems; evaluating program proposals; explaining and emphasizing budget limitations; cost allocations, fiscal notes; budget preparation; etc.. This work requires an understanding of related fields such as accounting, economics, statistics, business law, computer information systems and management. Persons in this class most often present a budget, which is given considerable weight and generally accepted, to an Accounting & Finance Manager or similar class or higher level within an agency having multiple programs and/or geographical locations.

The Budget Officer I class performs primarily procedural and technical work applying specific instructions/guidelines in compiling fiscal and accounting data and maintaining records. The Budget Officer III level receives only general direction in budget preparation and is working with very large agencies having very 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 position 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/finance management position in the agency and reports to a deputy 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.)

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Consults with and advises management on budget matters to exchange information, to identify the characteristics and impact of budget problems, and participate in management decisions affecting the agency's policies and program.

Develops policies, plans, and implementing procedures to collect the data and information required to prepare the agency budget.

Analyzes, compiles, and consolidates the data and information collected into the agency budget to provide management with a tool to control available financial resources.

Adjusts the budget to reflect changes in programs or changes in performance within a program.

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

Plans and develops data, graphs, and other materials to present to the Legislature or other governmental staff to justify requests for grants and expenditures of funds.

Represents the agency at legislative, intergovernmental and public conferences and hearings to present the agency's point of view in regard to programs and the budget.

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

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

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.

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

Knowledge of: accounting practices and procedures; project management procedures; personnel management practices; research practices and techniques; the programs of the agency for which budgeting services are provided; the structure, policies, and operating details of the budgeting systems for which responsible; the interrelationships among the various operations and groups served; service organizations and agency clientele; federal and state laws and regulations impacting the accounting functions of the agency.

Ability to: apply the principles of budgeting, statistics, and fiscal management; manage funds and develop budget projections; participate in management decisions; organize and present facts and opinions orally and in writing to exchange information and ideas and to promote agency needs, plans, and objectives; analyze data and draw logical conclusions; interact with supervisors, other employees, and the public to gain their cooperation and to establish working relationships; organize and present facts and opinions orally and in writing to exchange information and ideas and to promote agency needs, plans, and objectives.

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

Associate Degree in accounting, finance, business administration or related administrative management field plus three years experience in governmental accounting and/or budgeting. Experience may substitute for education on a year for year basis.

**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).