

**CLASS SPECIFICATION**  
**Budget Officer**

FLSA Status: Exempt  
EEOC Job Category: Officials & Administrators  
Union Representation: Unrepresented

**GENERAL PURPOSE**

Under direction, coordinates the development, implementation and maintenance of the District's budget process; conducts highly complex budgetary and financial studies and develops administrative policies and procedures related to budgeting and cost reporting requirements; supervises a small professional or technical staff; performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Budget Officer is responsible for coordinating and performing a wide variety of statistical and management analyses for formulation of the District's annual budget process including the preparation and monitoring of the District's Tentative and Adopted Budgets. The incumbent applies complex analytical and statistical methodologies in the development of accurate internal budgetary controls, policies and procedures and timely financial reports for management's use in monitoring of spending and available funding in their departments. The incumbent supervises a small professional and/or technical staff that participates and provides support in the work.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Plans, organizes, controls, manages and evaluates the work of assigned staff; with subordinate staff, participates in establishing operational plans and initiatives to meet department goals and objectives; implements department plans, work programs, processes, procedures and policies required to achieve overall department performance results; coordinates and integrates functions and responsibilities to achieve optimal efficiency and effectiveness; participates in developing and monitoring performance against the annual department budget.
2. Plans and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; monitors performance and provides coaching for performance improvement and development; provides or recommends compensation and other rewards to recognize performance; takes disciplinary action, up to and including termination, to address performance deficiencies, subject to management concurrence, in accordance with the District's classified human resources policies and procedures and labor contract provisions.
3. Provides leadership and works with staff to develop and maintain a high performance, customer service-oriented work environment that supports achieving the District's mission, strategic goals and core values.

4. Coordinates formulation, implementation and administration of the District's annual budget; creates budget timelines and budget related forms and procedures; designs and maintains budgetary systems for specialized applications; analyzes budget requests and proposals for compliance with budget development guidelines and funding source requirements; develops projections for revenue carryovers, fluctuations in funding sources and ensures that expenditures are in conformance with funding restrictions.
5. Develops and maintains budget controls; prepares, monitors and advises appropriate District managers regarding budget items and provides interpretive recommendations for solutions to their budgetary needs and issues.
6. Provides financial and budgetary information to administrators, auditors and external organizations; confers with District administrators regarding assigned projects on budget and financial planning and make recommendations based on findings; with other staff, develops "what if" scenarios and analyses of projected salary and benefit costs to support labor negotiations and confidential management deliberations.
7. Conducts analysis and research studies on various financial activities and operations within the District; performs a wide variety of professional level financial and budgetary analysis in the preparation of budget performance, budget projection and salary tracking reports; develops statistical models to forecast expenditures.
8. Identifies departmental needs and makes appropriate budget transfers affecting various funds; analyzes and updates actuarial reports to determine budgetary needs of District post-retirement program; monitors inter-fund loan repayments and prepares pro forma projections of future repayment scenarios.
9. Identifies departmental financial information needs and independently prepares ad-hoc reports using District's financial system to extract, tabulate and perform mathematical or statistical operations; uses appropriate programming applications to load budgets into District's financial system.
10. Supervises maintenance of the District's position control system, including records for all authorized and funded positions in District; makes journal entries and posts payroll expenses into financial system.

#### **OTHER DUTIES**

1. Prepares the Annual Financial and Budget Report (CCFS 311) and enters into State Chancellor's system.
2. Provides technical assistance to various departments for coding expenses, purchases, services and payroll; monitors and corrects coding of salary and benefit expenses; computes composite benefit rates.
3. Conducts training sessions on annual budget development procedures; makes presentation to managers and others on budgetary matters.

## **QUALIFICATIONS**

### **Knowledge of:**

1. Theory, principles, practices and techniques of public agency and community college district budget development and financing.
2. Applicable state and federal law and regulations governing the budgeting and financing of community college districts and local laws, ordinances, codes, regulations and policies affecting the budgetary systems of the District.
3. Research, statistical and forecasting principles and practices used in accounting, auditing and budget analysis; zero-based and incremental budgeting systems; District budgeting structures and systems including database and presentation software.
4. Financial computer tools and software, particularly as related to statistical analysis, modeling, data management and manipulation.
5. Advanced principles, practices and methods of administrative, budgetary, economic and procedural analysis.
6. Methods, practices, documents and terminology used in financial recordkeeping.
7. Principles and practices of business data processing, particularly related to the district's enterprise financial system.
8. Advanced accounting and internal control practices and procedures.
9. Principles and practices of sound business communications.
10. Principles and practices of effective supervision.
11. District human resources policies and procedures and labor contract provisions.

### **Ability to:**

1. Analyze and make sound recommendations on financial and budget data and prepare clear, concise and comprehensive financial and budget analyses, reports and presentations.
2. Verify the accuracy of financial data and information and ensure proper authorization and documentation.
3. Prepare clear, concise and complete budget and financial reports, documents and statements, in narrative and statistical form.
4. Analyze, interpret, explain and apply relevant laws, regulations, ordinances and financial and budget policies and procedures to other District staff.
5. Identify technical budgeting and operational issues and opportunities, analyze problems and alternatives and develop sound conclusions and recommendations.
6. Present conclusions and recommendations clearly, logically and persuasively.

7. Operate a personal computer and spreadsheet, financial modeling and other standard software.
8. Maintain budget files, records and documentation.
9. Exercise independent judgment and initiative within policy guidelines.
10. Establish and maintain cooperative and effective working relationships with District management, commissions, faculty, staff, students, auditors, vendors and other governmental agencies.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a recognized four-year college or university with a major in finance, accounting or a closely related field and at least five years of progressively responsible experience performing complex financial statistical and budgetary analysis, preferably in an academic setting or governmental agency; or an equivalent combination of training and experience. A master's degree in a relevant field is highly desirable.

**Licenses; Certificates; Special Requirements:**

A valid California driver's license and the ability to maintain insurability under the District's vehicle insurance policy.

**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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**

While performing the duties of this job, employees are regularly required to sit, talk or hear, in person and by telephone; use hands repetitively to finger, handle, feel and operate personal computers and other standard office equipment; and reach with hands and arms. Employees are frequently required to walk and stand and occasionally lift up to 10 pounds.

**Mental Demands**

While performing the duties of this class, incumbents are regularly required to use written and oral communication skills; read and interpret data; use math and mathematical reasoning; analyze and solve problems; learn and apply new information and skills; perform highly detailed work on multiple, concurrent tasks; and interact with District, students, vendors and others encountered in the course of work, some of whom are dissatisfied or abusive.

## **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 the essential functions.

Employees work under typical office conditions and the noise level is usually quiet.