COUNTY OF SOLANO
CLASS SPECIFICATION
BUDGET OFFICER

CLASS SUMMARY:

The Budget Officer is responsible for the direct management and coordination of the County's long-term budget preparation processes. The incumbent prepares the multi-year budget models with budget assumptions, forecasts, estimates and narrative justifications, budget presentations/ enactments, and implementation. The incumbent provides expert level authority and consultative services on budget and fiscal issues to elected officials, executive management, and line departments' managerial, budget, analytical, and accounting staffs.

The Budget Officer is a single-position executive management level class located within the County Administrator's Office. It receives broad administrative and policy direction from the Board of Supervisors and the County Administrative Officer.

The Budget Officer provides technical oversight to all professional and management staff performing budget development and administration, and financial analysis and projections for line departments. The incumbent may provide direct supervision to the analysts, accountants, technical, and clerical-support staff assigned to County Administrator's Office.

Successful performance requires the highest degree of ingenuity, judgment, independence, expert level skill, and full management authority in applying budget-related laws, regulations, policies, procedures, methods, and techniques and in carrying out the County's complex budgetary and financial assignments.

This class differs from the:

- **Assistant County Administrative Officer**, which assists the County Administrative Officer in the management of County activities and supervises a professional staff that provides consultation on fiscal management, program development, and evaluation to County managers.
- **Management Analyst (Principal)**, which has management level responsibility for reviewing, researching, analyzing and preparing annual proposed and final budget estimates for a major countywide program or a group of departments and budget units. The Budget Officer then analyzes, modifies, and incorporates this information into the final County budget.

ESSENTIAL DUTIES: This class specification represents the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.	**PERCENT OF TIME**	**DBM RATING**
Establishes and directs the preparation, implementation, and evaluation of the County's budget models in conjunction with proposed and final multi-year budgets; develops budget assumptions, forecasts, detailed estimates, and narrative and statistical justifications; and develops and submits proposals and recommendations for appropriations, re-apportionments, deferrals, rescissions, and borrowing Develops and implements County-specific budget policy statements, regulations, instructions, financial reporting standards, analytical methods, regulatory procedures, and monitoring systems for mandatory use.		

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ESSENTIAL DUTIES: (Continued)	PERCENT OF TIME	DBM RATING
Analyzes and consolidates budget estimates received from departments and other budget units into the final annual budget document to create the County's balanced, multi-year budget with revenue sources and funding needs.		
Plans and conducts complex budgetary, financial, and operational analyses and studies. Develops recommendations while dealing with uncertainty due to short and rapidly changing program and financial/budgetary deadlines and objectives; gaps and conflicts in program and financial/budgetary information; lack of predictive data; conflicting program and financial/budgetary objectives; and changing guidelines.		
Recommends changes in funding and budget plans that may require executive management and elected officials to revise substantive programs. Adjusts and modifies long-range budget plans to reflect feedback from the budget execution process and in accordance with changes in the goals of County's projects and programs.		
Serves in an expert consultant role to the Board of Supervisors and County Administrative Office and departmental management on financial and revenue issues and strategies; provides significant input into policy, operational, and service delivery decisions; implements and facilitates policy and programmatic changes as required.		
Provides technical authority expertise and services to line departmental staff to analyze, advice, and recommends specific solutions to budget formulation, justification, presentation, and execution issues related to multi-year appropriations and other budgetary processes.		
Supervises budget and administrative analysts, accountants and clerical staff.		
Testifies before elected officials, executive cabinets, and other examining and fund-granting authorities regarding proposed budgets and resource allocation plans; clarifies reports and findings; gains support for estimated budget needs.		
Represents the County in meetings with public officials, other public agencies, and civic groups in order to gather input, assess needs, develop priorities, and implement and maintain effective countywide projects and programs. Presents findings and recommendations to line management, labor organizations, media, community groups and the public in lay terms; and responds to questions.		

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ESSENTIAL DUTIES: (Continued)	PERCENT OF TIME	DBM RATING
Prepares a variety of correspondence, narrative, and statistical reports, procedures and other written materials; accesses varied databases and uses information from various sources to prepare materials. Performs other duties of a similar nature or level.		

Training And Experience:

Bachelor degree from an accredited college or university in public financial management, business/public administration, economics, governmental accounting, or other fields directly related to the budget, fiscal, and management duties of this class.

and

Four years of experience that included broad and extensive responsibility for the budgetary process of a large and/or complex public jurisdiction/department/agency including independently performing budget analyses, preparation, and control; analyses and development of fiscal and budgetary policies and procedures

Note 1 Master's Degree is desirable

Note 2 The objective of these minimum qualification patterns is experience demonstrating that the individual functioned as a technical authority in budget preparation and implementation function for a large local jurisdiction; provided full scope management direction to professional staff; and participated in management, policy, and fiscal matters that had significant countywide and intergovernmental impact.

Note 3 Budget and fiscal management experience in Solano County service is usually required although other governmental or private enterprise experience may provide some of the necessary background.

Licensing/Certification Requirements:

- California Drivers License, Class C
- Ability to qualify for a fidelity bond is desirable
- Professional certifications, such as the Certified Government Finance Manager (CGFM), are desirable

Knowledge of:

- Applicable federal, state and local laws, regulations, and procedures affecting local government's budget and fiscal activities; auditing; investment; debt management and issuance; and contract and grant administration

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Knowledge of: (Continued)

- California State guidelines and standards in the County Budget Act; generally accepted accounting principles; guidelines and standards of the Government Finance Officers Association (GFOA)
- Principles and practices of financial analyses; budget planning, developing, implementing, record-keeping, reporting, and controlling within local government; long-range fiscal planning and management; revenue forecasting; and funding sources
- Applicable federal, state and local laws, regulations, and procedures affecting local governmental operations
- Philosophy, objectives, trends, techniques and principles of public administration, organization and management
- Practices and techniques of administrative analyses and procedures, statistical methodologies, and report preparation
- Relationship between local, state and federal governments, public interest groups and private enterprise as they affect local government
- Legislative processes of local, state and federal governments
- Effective techniques for speaking before groups and making public presentations
- Management principles and practices, including work planning, supervision, and business management
- Financial software packages used in budget analysis including spreadsheet, database, and graphic software
- Oral and written communications, business correspondence, and report writing
- Standard office procedures, practices, equipment, personal computers, and software

Skills in:

- Planning, performing and/or directing the performance of complex financial, budget, revenue, and strategic planning analyses, budget preparation, implementation, and monitoring
- Directing work consistent with goals and priorities
- Using modern office equipment, and computers and related software applications
- Managing multiple priorities simultaneously
- Analyzing problems and data, identifying alternative solutions, projecting consequences of proposed actions, and implementing recommendations in support of goals
- Communicating information and ideas clearly and concisely orally and in written formats
- Preparing planning, narrative, fiscal and statistical reports, records, correspondence, and proposals
- Conducting research; collecting and analyzing data

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Skills in: (Continued)

- Developing timetables for obtaining needed funding for new or modified substantive government programs
- Developing and rendering authoritative interpretation of County and legal orders, guidelines and directives, and policies and precedents within and across County lines
- Selecting and using different and unrelated analytical techniques and methods as needed; develop new budgeting techniques and methods for forecasting long-range funding needs (e.g., three to five years plus into the future); and initiate and develop efficient, cost-effective policies for countywide use
- Researching, analyzing, projecting consequences of decisions, drawing valid conclusions, and making effective recommendations on management, budgetary and fiscal practices, procedures and problems
- Monitoring legislative and regulation changes; interpreting and assessing the impact on the formation and execution of County budgets; and recommending operational and procedural changes as required
- Representing the office and the County in meetings with the public and before public bodies
- Working with financial authorities and commissions, bond issuers, underwriters, credit rating agencies, investors and others
- Utilizing spreadsheets and financial, budget, and statistical software packages to analyze financial data, spot trends, and develop forecasts
- Supervising, evaluating, training, and developing staff
- Overseeing and evaluating staff and assigned work unit(s)
- Preparing logical, accurate, comprehensive, and legally sound narrative and statistical analyses, reports, correspondence, procedures and other written materials; presenting complex financial and budget concepts and strategies in easy-to-understand language
- Establishing and maintaining cooperative working relationships with the Board of Supervisors, County Administrative Officer, elected officials, staff and a variety of citizens and public and private organizations

ADA Requirements:

Positions in this class typically require reaching, standing, walking, fingering, grasping, talking, hearing, seeing, and repetitive motions.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

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Other Requirements:

Independent travel

Approval by:

10-21-10

Donald W. Turko
Director, Human Resources

Date

Class History Information:

BOS Adopted	Revised	Retitled	Class Code	Sal Plan/BU	OT Code
2/23/2010			107310	61	5