



Budget Coordinator - CAO

CLASS SPECIFICATION

CLASS SUMMARY:

Under general supervision, performs a variety of confidential, complex, and specialized paraprofessional and financial management duties to assist the Budget Officer or higher level manager within the County Administrator's Office (CAO) with coordinating, preparing, distributing, and presenting the County's annual, mid-term, and multi-year budgets; consolidates budget documents; manages position control; processes accounts payable, accounts receivable, and payroll; and performs budgetary, statistical, and financial reporting and recordkeeping in support of professional administrative and analytical staff within the CAO.

This is a single-position classification located in the County Administrator's Office. Successful performance requires knowledge of local governmental budget preparation, processing procedures, timelines and related State and federal laws and regulations. The incumbent must possess high levels of organizational and time management skills, and exercise independent judgment and diplomacy. The incumbent must be able to initiate and complete assignments with minimal direction and control.

DISTINGUISHING CHARACTERISTICS:

This class is distinguished from the:

- **Budget Officer** who is responsible for the direct management and coordination of the County's long-term and multi-year budget preparation processes and provides expert-level consultative services on budgetary and fiscal issues to elected officials, executive management, and line departments' budget preparation staff.
- **Management Analyst** classes which perform professional level budgetary, fiscal, programmatic, legislative, intergovernmental, policy, and/or other administrative analyses and highly responsible staff support for assigned departments.
- **Office Supervisor** classification which is responsible for supervision of all administrative functions of a department.
- **Accountant, Accounting Technician, and Accounting Clerk** classes which perform professional, technical, and/or clerical accounting and financial assignments for assigned line department.

SUPERVISION RECEIVED AND EXERCISED:

- Supervision is provided by the Budget Officer or a higher level manager within the County Administrator's Office.
- When assigned, may supervise clerical support and/or technical staff; however, in general, the incumbent will collaborate and coordinate with line departments' staff to obtain required budget and fiscal documents in a timely manner.

ESSENTIAL DUTIES: This class specification represents the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.

Provides specialized technical administrative support and paraprofessional financial management-level work to assist in preparing, reviewing, and producing the County's various budget documents and related statistical and analytical information by:

- Providing support to the County's and County Administrator Office's budget process; reviewing budget requests; summarizing findings; assembling and analyzing data; proposing or suggesting appropriate actions, including reallocation of resources; working with departments to facilitate budget proposal preparation and execution of recommended budget.
- Coordinating the completion of the final budget document including compiling, composing, proofreading and editing the departments' submitted budget documents and preparing graphics, illustrations and descriptions of budget-related information.
- Assisting in developing countywide and department budget procedures, timelines, and processes by reviewing County budget processes, providing recommendations to promote automation, improving efficiencies, and assisting with the implementation of automated processes.
- Providing paraprofessional support within the department's fiscal program; reviewing and preparing accounting transactions such as journal vouchers, encumbrance reviews, liquidations, and billings and receivables; researching and resolving discrepancies and issues between actual and reported expenditures and actions.
- Responding to internal and/or external auditors' questions and/or requests.
- Evaluating, recommending and completing special payroll and additional pay requests.
- Developing and providing budgetary information to be used for feasibility studies, project/program development, and analysis of program viability, effectiveness, and efficiency.
- Coordinating with the Auditor-Controller's Office to produce final budget documents.
- Overseeing the department's administrative overhead cost plan reporting and fee updates.
- Researching, gathering and providing fiscal information and reports in preparation for, and during, labor contract negotiations.
- Coordinating with the Auditor-Controller's Office and the Department of Information Technology to deploy integrations between specialized financial and budgetary software systems.
- Developing and maintaining ad hoc financial reports using specialized software.
- Providing first-level user support for County staff related to technical questions or problems concerning specialized software.

Performs other duties of a similar nature or level as assigned.

EDUCATION AND EXPERIENCE:

Experience: Three (3) years' experience within Solano County as an Accounting Clerk III, Accounting Technician, or another County class where budget preparation, accounting, and/or public finance is a significant part of the job.

or

Five (5) years' public sector office administrative experience, including three (3) years of public sector budget preparation and maintenance, public financial management, and/or accounting.

Note 1: Sixty (60) semester or ninety (90) quarter units from and accredited college or university of which 15 semester or 22.5 quarter units are in governmental budgeting and accounting, public finance and reporting, or bookkeeping, may substitute for two (2) of the three (3) years' public sector budget preparation and maintenance, public financial management and accounting experience.

Note 2: While professional certifications are not required, possessing one or more issued from a recognized certification body and directly related to the intent of the class is desired and may be considered during the rating and/or selection processes.

Licensing, Certification and Registration Requirements:

- The incumbent is required to possess a valid California Driver's License, Class C, by the date of appointment, and it must be kept current while employed in this class.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- State and federal mandates and government codes and regulations applying to California county budgets.
- Accounting and/or bookkeeping practices applying to fund accounting procedures for preparing and reviewing large fund transfers.
- Financial recordkeeping, bookkeeping, and basic governmental accounting principles and practices.
- Principles and practices of budgeting, cost analysis, and fiscal management.
- Project and program planning, execution, and management including software, techniques, tools, and statistical methods.
- Administrative and statistical analyses, and statistical report preparation and graphic presentation.
- Business arithmetic, including percentages, ratios, and decimals.
- Basic auditing principles and practices.
- Recordkeeping and reporting practices.
- Manual and automated filing and reporting systems.
- Standard office procedures, practices, and equipment.
- Techniques of effective interpersonal communication.

Skills/Abilities to:

- Understand, interpret and apply applicable laws, rules, regulations, ordinances, policies, and procedures, and use good judgment in their application.
- Understand and work toward program objectives and departmental goals and procedures.

- Prepare, maintain, reconcile, and process simple to complex and comprehensive financial, accounting, payroll, statistical, and auditing reports, records, and materials.
- Review, interpret and proof financial and budgetary reports and documents.
- Make statistical and financial computations with a high degree of speed and accuracy.
- Investigate, negotiate and resolve budgetary, financial, accounting, and other program related conflicts.
- Work with governmental funding sources to resolve discrepancies.
- Research regulations, procedures and technical reference materials; gather, organize, and interpret data; and complete financial reports.
- Use initiative, problem solving and critical thinking skills, and independent judgment within established guidelines.
- Perform technical and specialized tasks and functions in an independent, competent, and timely manner.
- Organize and manage a variety of work assignments and projects having simultaneous and/or conflicting deadlines and carry them through to successful completion.
- Project and weigh consequences of decisions.
- Carry out written and verbal directions.
- Secure cooperation and teamwork among line departments' professional and support staff; establish and maintain effective working relationships.
- Use tact, discretion, and diplomacy in dealing with department representatives and the public.
- Maintain sensitive and confidential records and information.
- Communicate information and ideas clearly, concisely, and effectively both verbally and in writing, including correct use of English grammar, vocabulary, punctuations and spelling for written and/or verbal communications.
- Prepare a variety of written communiqué such as budget documents, graphics, reports, records, files, correspondence, and policies and procedures including technical and statistical reports, narrative reports, business correspondence, emails, press releases, and bulletins.
- Maintain accurate records and document actions taken.
- Proofread, develop, and compose correspondence and routine reports.
- Organize, research, and maintain office files.
- Use computers, Microsoft Suite applications, and County's fiscal and financial software.

PHYSICAL REQUIREMENTS:

- **Mobility and Dexterity:** This class typically requires employee to perform the following: stooping, kneeling, reaching, standing, walking, fingering, grasping, feeling (i.e., sense of touch), and repetitive motion.
- **Lifting, Carrying, Pushing and Pulling - Sedentary Work:** The employee exerts 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.
- **Vision:** The employee must have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc., and have depth perception to operate a motor vehicle.

- **Hearing/Talking:** The employee must be able to perceive the nature of sounds at normal speaking levels, with or without correction; receive detailed information through oral communication; and communicate to express and exchange ideas.

WORKING CONDITIONS:

- **Office Work:** The employee in this class will most often be working in an office setting.
- **Traffic Hazards:** The employee may be required to operate a vehicle and subject to traffic hazards while driving.

OTHER REQUIREMENTS:

- **Background Checks:** The County may conduct background, credit and reference checks on candidates prior to appointment to this class. The background check may include the State of California Department of Justice, the Federal Bureau of Investigation (FBI), the Child Abuse Central Index (CACI), and criminal checks in any state, city, and/or county where the applicant has lived, worked, or gone to school.
- **Independent Travel:** The employee may be required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, to attend meetings with community organizations, etc.
- **Work Hours:** The employee may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.

CLASS HISTORY AND CLASS INFORMATION

- **Date Approved by the Civil Service Commission:** March 12, 2025
- **Date Class Title Added to the Listing of Classes & Salaries by the Board of Supervisors:** March 25, 2025
- **Class Code:** 40406C