

## COUNTY OF SOLANO

### BUDGET TECHNICIAN (COUNTY)

Rev. 04/01

#### DEFINITION

Under general direction, acts as liaison with departments' in coordinating the County Annual Requested Budget; monitors County expenditures and revenues; develops, establishes and implements budget and financial reports document formats, procedures and forms for submittal of the County budget documents; proof reads budget submittals for consistency with County policies and procedures; coordinates the printing and distribution of the County Budget and other financial reports; responsible for accounts payable, accounts receivable, payroll for the County Administrator's Office (CAO) office; acts as Central Data Processing (CDP) liaison for the Board of Supervisors and the County Administrator's office; performs related duties as required.

#### CLASS CHARACTERISTICS

This single member class is characterized by the performance of a variety of complex administrative support duties as a primary and continuing part of assigned responsibility. Incumbent is responsible for on-going or re-occurring projects. The primary responsibility is to assist in coordinating the development of the budget among County departments, which requires the application of specialized knowledge (such as budget preparation and processing procedures). This class is distinguished from those positions in the field that help facilitate the completion of the budget document by their on-going support relationship with a specific department relieving the supervisor of administrative detail. The Budget Technician (County) provides support to professional staff in the County Administrator's Office.

#### EXAMPLES OF DUTIES

Depending on assignment, duties may include, but are not limited to the following:

1. Participates and provides technical support in the preparation and production of County Budget documents and related analytical information; assists in developing and designing formats for providing budget related information; collects supplemental budget documentation; edits and proofs budget submittals for consistency and compliance with County policies and procedures.
2. Coordinates all aspects of printing and distributing County Budget documents; coordinates clerical budget activities with County departments; coordinate with County Auditor-Controller's office to produce the County's Final Budget document; compiles historical financial data on designated aspects of the County Budget; acts as liaison between the County Administrator's Office and the budget staff of other departments concerning budget document preparation; assists County departments' in procedures related to the gathering or dissemination of budget related information.

EXAMPLES OF DUTIES (Continued)

3. Processes complex documents and correspondence determining proper routing based on subject or content; receives and prioritizes mail and other communications; ensures distribution/routing of documents, pamphlets and circulars to staff and others needing access to such information; determines methods of processing/delivering of communications or materials; coordinates and expedites dispatch of correspondence, materials or supplies; decides whom to notify of an official action and/or regulation/law change; selects appropriate procedures to carry out directives.
4. Provides assistance in developing departmental budget procedures and review processes; answers clerical questions related to the budget; screens callers; takes and relays budget inquiries and messages; evaluates informational needs of callers; directs people or transfers calls to appropriate parties or offices; calls people to request, update or verify budget information; provides others with procedural program information; explains policies, procedures, codes and/or regulations; arranges schedules of appointments, meetings and conferences.
5. Develops and/or maintains manual or automated files and record-keeping systems; maintains manuals by changing pages and/or making necessary notations; updates and/or purges budget files in accordance with procedures; uses and maintains cross reference, tickler and/or suspense files; conducts budget file searches to locate misplaced items or information useful in document preparation activities; prepares new budget folders; reviews information contained in files for completeness and accuracy.
6. Compiles, composes, proofreads, and edits routine reports, correspondence, forms, informal minutes or meeting notes and budget narratives and statistical documents; prepares documents; selects appropriate document formats; gathers and analyzes information necessary for document composition, meetings and presentations.
7. Runs computerized budget reports for supervisors and staff analysts; reconciles month-end budget reports for accuracy; prepares copies of various budget related memorandums, reports, and books for the public, supervisors and the Board of Supervisors.
8. May be assigned responsibilities in processing payroll/personnel actions, inventory control, purchasing of supplies, maintaining logs or status records, receiving revenue, monitoring segments of expenditure reports, procedural/systems review, monitoring legislative activities and/or supervisory activities over other clerical personnel and operations; may coordinate employee training by informing, registering, posting, distributing and monitoring attendance of staff.

EXAMPLES OF DUTIES (Continued)

9. Prepares and processes all invoices and vendor claims for the County Administrator's office and other related budget units under the CAO's responsibility; maintains accurate vendor claims files; telephone contact with vendors relating to payments; maintains contract files; acts as a liaison between the County Administrator's office and Information Services (ISD) concerning computer problems and needs.

QUALIFICATION GUIDELINES

Education and/or Experience

High school diploma or GED required, Associates degree preferred; supplemented by three (3) years of full-time work experience in administrative accounting, including one (1) year of experience in governmental accounting that demonstrates possession of and competency in the requisite knowledge and abilities.

Knowledge/Skills/Abilities

Thorough knowledge of administrative accounting and/or bookkeeping practices that apply to fund accounting procedures for the preparation and review of large fund transfers; government accounting procedures; regulations governing budgets, accounts and sub-accounts.

Considerable knowledge of the State Controller mandates and government codes that apply to County budgets; operation of automated accounting and budgetary record-keeping systems; administrative support, office and budget methods; procedures and techniques associated with manual and automated filing and reporting systems, business correspondence, report writing and correct English usage; standard operating policies, procedures and administrative structure.

Ability to read, understand and applicable laws, rules, regulations and policies related to fund transfers and agency appropriations; work with state government funding sources to resolve discrepancies in funding; make arithmetic computations with a high degree of accuracy; research and gather data and complete financial reports; establish and maintain cooperative working relationships; work independently; communicate effectively both verbally and in writing; understand program objectives in relation to departmental goals and procedures; understand and analyze expenditure reports; maintain accurate records and document actions taken; organize and prioritize work assignments; research regulations, procedures and/or technical reference materials; demonstrate tact and diplomacy; proof budget documents; recognize and respect limits of authority and responsibility; project consequences of decisions; use discretion in dealing with the public and handling of sensitive information; use correct English grammar, punctuation and spelling; proofread, develop, and compose correspondence and routine reports independently; meet the public in situations requiring diplomacy; process and maintain

QUALIFICATION GUIDELINES (Continued)

documents and materials; understand and carry out written and/or verbal directions; determine the appropriate course of action in emergency or stressful situations; prepare narrative and statistical reports; secure cooperation and teamwork among professional and/or support staff; maintain confidentiality of information.

SPECIAL REQUIREMENTS

None.

SUPPLEMENTAL INFORMATION

Independent travel may be required.

Applicants are required to demonstrate intermediate spreadsheet skills through the passing of a County approved test.

Possession of or ability to obtain a valid Class C California driver's license may be required.

ADA COMPLIANCE

**Physical Ability:** Tasks involve the ability to exert light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds). Tasks may involve extended periods of time at a keyboard or work station.

**Sensory Requirements:** Some tasks require visual perception and discrimination. Some tasks require oral communications abilities.

QUALIFICATION GUIDELINES

Environmental Factors: Tasks are regularly performed without exposure to adverse environmental conditions, such as dirt, dust, pollen, odors, wetness, humidity, rain, fumes, temperature and noise extremes, machinery, vibrations, electric currents, traffic hazards, toxic agents, violence, disease, or pathogenic substances.

\_\_\_\_\_  
Director of Human Resources

\_\_\_\_\_  
Date

Solano County is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, Solano County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

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