



# Budget Specialist

Class Code:  
4844

Bargaining Unit: Unrepresented - Non-management

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA  
Established Date: Aug 12, 2008  
Revision Date: Aug 12, 2008

## SALARY RANGE

SEE SALARY SCHEDULE

## JOB DESCRIPTION:

### JOB DEFINITION

Under direction, to provide professional-level financial services work in budget development, reporting, monitoring and variance analysis; to assist in the administration of expense to actuals and financial reporting; and to perform other related duties as assigned.

### DISTINGUISHING FEATURES

The Budget Specialist is a journey-level finance position and serves as a lead worker in the Finance Bureau's Budget Unit. This position reports to the Financial Analyst (Budget) and is responsible for budget preparation, monitoring, reporting and variance analysis. The Budget Specialist is distinguished from the next higher-level class of Financial Analyst (Budget) in that the latter manages the daily operations of the Budget Unit and has administrative supervision of professional and support staff, whereas the Budget Specialist serves as a lead worker and provides financial services assistance in budget preparation and monitoring, and assistance in the daily operations of the Budget Unit.

## EXAMPLES OF DUTIES:

NOTE: The following are duties performed by employees in this classification; however, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all listed duties.

1. Serves as a lead worker in the Finance Bureau's Budget Unit and may assist in the training and assignment of routine work of support staff.
2. Coordinates the development of budget submissions from various Court locations that require moderately complex justification and consideration of alternatives; and formulates the Court's budget submission and additional requests for funding.

3. Reviews a variety of financial data to ensure revenues are within expectations and expenditures do not exceed approved plan; investigates and resolves accounting discrepancies; and prepares a variety of budget and fiscal reports and presentations for submission to the immediate supervisor and Bureau Chief II, Finance.
4. Coordinates internal monthly reporting requirements, including budget to actuals, expenditures and encumbrances, and reports from various systems for court-wide locations.
5. Coordinates external quarterly and annual reporting, including budget to actuals, expenditures and encumbrances, and reporting from various systems for the entire Court.
6. Prepares full-time equivalent headcount reporting in conjunction with monthly and/or quarterly financial reports.
7. Conducts special studies of a variety of Court programs; researches, gathers, compiles and validates data collected from different resources.
8. Monitors grant funds for compliance with financial terms; reviews expenditure reports and ensures proper allocation of expenditures to the appropriate fund and the availability of funds; interprets contract and recommends solutions to contractual problems.
9. Interprets and applies a variety of policies, rules and regulations; and provides technical assistance to Court managers and staff to ensure that program guidelines are being met.
10. Attends a variety of AOC, Court, regular staff and budget meetings.
11. Prepares a variety of correspondence, periodic and special reports, procedures and other written materials.
12. Operates a variety of modern office equipment, including personal computer, fax and copier.
13. Performs other related duties as assigned.

## **MINIMUM QUALIFICATIONS:**

### Option I

Experience:

The equivalent to three years of full-time experience in the class of Fiscal Assistant III or equivalent position in the Superior of California, County of Alameda classified service

### Or Option II

Experience:

The equivalent to three years of full-time professional or technical work experience in accounting, budget development and monitoring, grant management or similar financial services.

Or Option III

Education:

Possession of a Bachelor's degree from an accredited college or university in business or public administration or other related field.

And

Experience:

The equivalent to one year of full-time professional or technical work experience in accounting, budget development and monitoring, grant management or similar financial services.

## **KNOWLEDGE AND ABILITIES:**

***Knowledge of*** principles and practices of governmental budget development and administration; principles and practices of governmental accounting, work process review and fiscal reporting; financial record keeping, auditing practices and fiscal management; work planning, staffing analysis and project management; principles, practices and implications of systematic change in administrative systems; data collection and analysis techniques; standard application of office automation, including Microsoft Work, Access, Excel, E-mail, Outlook and the Internet; and operation of modern office equipment; practices and techniques of administrative analysis and report preparation; applicable federal, state and local policies, rules and regulations; office administrative practices and procedures; planning and organizing work; and leading and training staff.

***Ability to*** develop and administer multiple budgets; conduct, research, gather, compile and analyze a variety of fiscal studies; organize and prioritize work; and meet critical deadlines; lead the work of others on a project or day-to-day basis; exercise sound independent judgment within established policies and guidelines; and exercise discretion; interpret, explain and apply financial regulations, policies and procedures, and processes; evaluate situations, recommend resolutions and identify alternatives; make arithmetical and simple statistical calculations; evaluate and modify work methods; establish and maintain working relationships with clients,

managers, staff and representatives from other agencies; project consequences of recommendations and decisions; monitor fiscal transactions, and audits fiscal records and documentation; prepare clear and accurate narrative and statistical reports, correspondence, procedures and other written materials; represent the bureau and/or Court in meetings; and maintain accurate financial records and audit data.