

UNIVERSITY BUDGET OFFICER SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date	Last Action
4733	Assistant University Budget Officer	03	355	12 mo.	10/01/16	Rev.
4728	University Budget Officer	03	355	12 mo.	10/01/16	Rev.

'Promotional Line: 271

Series Narrative

Employees in this series are responsible for administering the functions and operations of a university budget office (such as securing state appropriations, projecting operating costs and expenditures, and reviewing and adjusting budget accounts).

DESCRIPTIONS OF LEVELS OF WORK

Level I: Assistant University Budget Officer **4733**

Employees at this level manage a major component of the budget office and work under administrative direction from the university budget officer to assist in the preparation of Appropriation Request, Internal Budget, and other annual financial reports for the University and/or Agency.

An Assistant University Budget Officer typically:

1. coordinates the planning, development, and execution of programs, projects, procedures, and reports of the unit responsible for;
2. directs and conducts studies and investigations of problems affecting operations of the unit; recommends actions or alternatives to be taken by management to resolve the problems;
3. performs liaison work for the unit with others in the institution; confers with other units on the development, interpretation, and installation of budget programs and procedures; interprets policies;
4. has full managerial responsibility for the staffing, training and development, performance evaluation, and goal-setting of personnel in the unit;
5. may assist in the compilation of university budget document(s) and internal/external reporting requirements;
6. implements policies, programs, and procedures within the unit through subordinate staff;
7. functions as university budget officer during absences;
8. may assist in the administration of entire budget office as designated by the university budget officer;
9. performs other related duties as assigned.

Level II: University Budget Officer**4728**

Employees at this level direct all the functions and operations of a university budget office and serve as a university's chief representative in budgetary matters. They work under administrative review of the university's executive officer(s).

A University Budget Officer typically:

1. provides various financial information to the university's executive officer(s) and their staff in a variety of differing formats; participates in university budget meetings, acting as chief resource to executive officer(s) and staff regarding financial matters and budget policy;
2. develops, implements, and manages the University's operating budget;
3. directs the compilation of official university budget document(s);
4. oversees preparation of State budget reports and related information requests;
5. oversees internal budget-related processes; and related technical systems, for all fund types;
6. coordinates the preparation of reporting and back-up materials required by internal and external agencies in formats specified by each;
7. acts as campus authority on budget questions from outside agencies, governmental bodies, and internal departments;
8. projects probable revenues for appropriate campus planning;
9. coordinates the preparation of materials for and responds to both internal and external auditors;
10. directs staff involved in university budget operations;
11. performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:**Level I: Assistant University Budget Officer****4733**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Bachelor's degree with a major in Accountancy, Business Administration, or a field related to the position.
2. Three (3) years of professional experience in a supervisory or managerial capacity in the fields of Accountancy, Business Administration, or a related professional field.

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of general accounting, budgetary, and management principles, practices, and procedures.
2. Knowledge of (or ability to learn) governing board, university or departmental policies, rules, and regulations affecting budget operations or related areas.
3. Knowledge of economic and accounting principles and practices, and the analysis and reporting of financial data.
4. Skill in using analytical software tools, data analysis methods, and other computer applications.
5. Skill in collecting, analyzing, and organizing technical data.
6. Ability to analyze and prepare documents, reports, and correspondence.
7. Ability to manage a budget and work within the constraints of that budget.
8. Ability to analyze, organize and prioritize work while meeting multiple deadlines.
9. Ability to manage assigned activities, including the direction of personnel and coordination of programs.
10. Ability to communicate and work effectively with wide range of constituencies; collaborate and build strategic relations in a diverse community inside and outside of the organization; strong interpersonal and communication skills.
11. Ability to communicate effectively in both oral and written form.
12. Ability to identify problems, evaluate alternatives, and implement effective solutions.
13. Ability to exercise sound judgment in making critical decisions.

Level II: University Budget Officer**4728**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Bachelor's degree with a major in Accountancy, Business Administration, or a closely related field.
2. Five (5) years of professional experience in a supervisory or managerial capacity in the fields of Accountancy, Business Administration, or related professional field.

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Extensive knowledge of accounting, budgetary, and management principles, practices, and procedures.

2. Extensive knowledge and requirements of governing boards, universities or departmental policies, rules, and regulations affecting budget operations or related areas.
3. Knowledge of economic and accounting principles and practices, and the analysis and reporting of financial data.
4. Skill in using analytical software tools, data analysis methods, and other computer applications.
5. Skill in collecting, analyzing, and organizing technical data.
6. Skill in decision making by considering the relative costs and benefits of potential actions and choosing the most appropriate one.
7. Ability to compile, organize, analyze, prioritize, and communicate financial and budgetary data and results in a clear and concise format.
8. Ability to manage a budget and work within the constraints of that budget.
9. Ability to and work effectively with wide range of constituencies; collaborate and build strategic relations in a diverse community inside and outside of the organization; strong interpersonal and communication skills.
10. Ability to communicate appropriately regarding accounting and financial issues, and exercise tact when solving controversial problems.
11. Ability to exercise sound judgment in making critical decisions.
12. Ability to identify complex problems, reviewing related information to develop and evaluate options and implement solutions.
13. Ability to take initiative; willingness to remain abreast of changes in accounting policies and procedures, including computer applications.

ⁱSee the Promotional Line List for a complete listing of the classes in this/these promotional line(s).