

SUPERVISING BUDGET TECHNICIAN

DEFINITION

Supervises a large group of clerical employees performing technical and general clerical tasks related to development and maintenance of the District budget.

TYPICAL DUTIES

Directs and coordinates multiple units of technical-clerical personnel in reviewing and processing budget-transfer requests and preparing input documents for the computer system that aids in development of the several editions of the annual budget of the District.

Supervises the checking and proofing of Board reports, vouchers, reports, communications, and the editions of the budget.

Coordinates and clarifies procedures and instructions related to budget preparation and maintenance, contacts other divisions and branches by telephone and in writing, and recommends changes for the purpose of improved efficiency.

Plans, schedules, and monitors progress of regular and special projects to meet important deadlines.

Supervises the maintenance of files and records.

Researches records and compiles data and prepares reports related to the budget.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Supervising Budget Technician supervises several units of technical and general clerical employees in detailed clerical tasks involved in District budget preparation and maintenance in the Budget Services and Financial Planning Division.

A Financial Analyst performs a variety of professional-level staff activities that are primarily oriented toward the analysis of financial data and budgets, the preparation of year-end fund availability reports, and long-range cash flow projections.

A Senior Budget Technician supervises and participates in the work of a small group of Budget Technicians performing detailed clerical and computational duties involved in budget development and maintenance.

SUPERVISION

General direction is received from a Principal Financial Analyst. General supervision is exercised over Senior Budget Technicians and Budget Technicians. Functional supervision may be exercised over work performed by lower-level clerical personnel.

CLASS QUALIFICATIONS

Knowledge of:

- Principles of supervision and training
- Budget laws, regulations, and provisions contained in the Education Code, California School Accounting Manual and its supplements, and Board Rules
- Organization, functions, and key personnel of the District
- Office organization and procedures
- Records and files management
- Human Resources Division and Personnel Commission regulations and procedures affecting fiscal and budgetary matters
- Basic principles of data processing
- Microsoft Windows Operating Systems
- Applications such as Microsoft Word, Excel, Access, and PowerPoint

Ability to:

- Plan and coordinate a large amount of detailed clerical work with important deadlines
- Select, train, and evaluate clerical personnel
- Review detailed work for accuracy and completeness
- Compile and analyze numerical data and make calculations
- Communicate effectively in writing and orally
- Write and edit instructions and lay out forms
- Work effectively with all levels of personnel
- Handle and perform multiple tasks
- Operate a computer

ENTRANCE QUALIFICATIONS

Education:

Graduation from high school or evidence of equivalent educational proficiency, preferably including or supplemented by courses in office management, supervision, and accounting or bookkeeping.

Experience:

Four years of clerical experience, including two years in a supervisory capacity. Two of the required four years of experience must have included responsibility for compiling and computing statistical or financial data and preparing related reports or budget documents.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.

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